APPENDIX - A

IMAP Plan Outline

(Integrated Market Action Program)

Overview from Corporate Strategic Plan and Market Assessments

Company (Where it's been, where it wants to go and why.)
Product/Service (Research and development, current offering configuration, market standing, pricing and migration plans.)
Market (Maturity, window of opportunity, sales cycle, market size, market share, customer share, brand equity.)
Sales Channels (Which ones for what part of the offering and why.)
Alliances/Sponsorships/Affiliations (Which ones, how use, and why.)
Customer Care (How manage overall customer experience, now and in future.)
Competition (Known, foreseen, concerns about unforeseen.)
SWOT Analysis (Strengths, Weaknesses, Opportunities, Threats.)
Infrastructure (Current capabilities, what's needed: people, systems, technology, management.)

Business Objectives (Short list, specific, measurable.)

Customer Segmentation (*By company*: Geography, industry type, size of business, type of business, revenue, employees. *By individual*: Job title, experience level, age, gender, embracing attitude, overcoming attitude.)

Value Proposition (Major benefit for what cost. Understood or not.)

Strategic Positioning (Strategic Positioning Statement, Promotional Positioning Line, key messages, supporting facts.)

Marketing Strategy (Driven by the relationship aspect primarily, with pricing, distribution and the offer aligned.)

Integrated Tactics Plans (Acquisition/ Closing/ Retention (A/C/R) Phases)

Overview (Tactical approach to closed-loop Marketing, Sales, Customer Care.)
Description (Individual Promotional/Relationship Enhancement and Personal Interaction Tactics.)
Front Office Process (How Marketing, Sales and Customer Care integrated and organized to deliver, detailed in Interaction System Flow.)
Timeline/Responsibilities (Major events for one year, detailed per quarter.)
Budget (Organized by A/C/R Phase, Incremental and Fixed, by in-house or outsourced; cash flow.)

Financial Analysis/Justification

Leading Indicator Metrics (Captured during planning and implementation to hone business model to mitigate risk and maximize profits.)

Continuity (Methods to check current progress in implementation and to update plan.)

Critical Reference Information (See detailed list.)

Critical Reference Information

Company
- Background
- Purpose/Vision
- Industry Context
- Policies, Procedures
- Processes
- Agreements
- History, Projects
- Press & Media
- Articles

People
- Biographies
- Expertise, Capabilities
- Customer Relationships
- History, Projects
- Press & Media
- Articles

Products & Services
- Descriptions
- Configurations, Pricing
- Documentation
- Applications
- Results
- Usage, Typical, How To
- History, Projects
- Press & Media
- Articles

Key Customers
- Background
- Applications
- Financial Data
- Key Contacts
- Case Histories
- Press & Media
- Articles

Technology
- R&D
- Investment
- Industry Context
- Roadmap
- How It Works
- Papers
- History, Project
- Press & Media
- Articles

Competition
- Products & Services
- Pricing
- Organization
- Marketing & Selling Strategies
- Marketing Literature
- Competitive Analysis

External Factors
- Economy: Domestic & International
- Major Events
- Industry News/Events
- Consumer News
- Business Environment
- Local News

Alliances/Sponsorships
- Purpose
- Structure
- Marketing
- Alliance/Sponsorship Manager
- Financial Data
- Key Contacts

Sales Channels
- Background
- Type for Each Product
- Type for Each Customer Class
- Territories
- Channel Manager
- Financial Data
- Key Contacts

Key Marketing Documents
- Corporate Strategic Plan
- Market Assessments
- Targeting Research
- Tracking Research
- Ongoing Research Plans
- Priority Customer Profiles
- Interaction System Flow
- Relationship Tracking System Documentation

APPENDIX - B

The IS Flow is a guide for what Interactions are expected to happen between the company and its customers and shows how RIV Number Grid 370 (shown in Figure 14) is applied to a company.

In the example illustrated in this Appendix, Interactions are customized for XYZ Company to execute the Alternative #2 Marketing Strategy, worst case scenario. The Tactics Code follows the numbering on the Tactics Plan Overview (shown in Figure 12). The Interaction sequences are determined from the Front Office process, organized into Acquisition/Closing/Retention Phases and patterned after typical Interaction sequences in the business process's library of Interaction Sequences.

The CEL (Contact Evolution Level) Number is a whole number followed by a decimal. The whole number reflects the CEL Level position of the contact. The decimal is the sum of the RIV (Relative Interaction Value) Numbers of the Interactions that have occurred within that CEL Level. Each Interaction in the IS Flow has an effect, or a value. Some Interactions trigger movement to another CEL Level.

What would constitute movement from one CEL Level to another is defined while setting Tactical Requirements for the Marketing Strategy. When movement to another CEL Level is not triggered, then a RIV Number is added to the current CEL Number.

In the IS Flow document that follows starting on B-4, when movement is required, it is noted by the expression "To CEL #." When a RIV Number is to be added instead, the expression "+.xxx" is used. For example, on page B-9 an Interaction C1-2a Thank You Note for an appointment has a RIV Number of " +.120;" an Interaction of C1-1j Not Interested - Don't Handle on the initial appointment triggers movement "To CEL# 0.0."

Figures 31 through 35 illustrate how the IS Flow simplifies and standardizes note taking for users and converts an Interaction Record into tabular form instead of the usual running dialogue of contact management systems. The standardization of notes and the tabular format allows the Interaction Record to be quickly read and the quantification of the Interactions makes it possible to analyze an individual record and compare it to others in the database for more robust reporting.

By linking Incremental costs to specific Interactions, a company is much better able to make adjustments to maximize profit. The Incremental costs are for the XYZ Company example. The Incremental costs are derived using Activity Based Costing and are unique for each company.

In the XYZ Company example to keep the model as simple as possible, management elected to consider ancillary programs such as an Influencer Program as a fixed cost rather than tracking all the associated Incremental costs. Management also elected to include in the Activity Based Costing for each Interaction the entire anticipated cost of its team to execute the Interaction as

well as the entire anticipated cost to interact with all the people necessary at the customer company. This way the entire Incremental costs are captured with one entry. To capture more detail, Incremental costs can be tracked by the key contact as well as by all the people subordinated to that key contact at the customer company (Figure 42) and then adding them together. Even more detail can be captured by tracking all the Interactions the XYZ Company people have with their customer company.

Interaction System (IS) Flow

Acquisition Interaction

Tactic Code		Starts CEL #1.0	Incremental Cost
A1	Promotional Direct Mail		
	A1-1 1st Postcard	+.030	.50
	A1-2 2nd Postcard	+.030	.50
	A1-3 3rd Postcard	+.030	.50
	A1-4 Brochure	+.030	2.00
	A1-5 4th Postcard	+.030	.50
	A1-6 Returned to Sender		
	A1-6a Wrong	To CEL # 0.0	.35
	A1-6b Refused	To CEL # 0.0	.35
A2	Outbound Telemarketing		
	A2-1 Leave Voice Mail #1	+.030	6.00
	A2-2* Attempt Call		
	A2-2a Disconnected/Wrong #	To CEL # 0.0	1.00
	A2-2b Busy/NA	+.000	2.00
	A2-2c Get Voice Mail	+.000	2.00
	A2-2d Gatekeeper Block	+.010	5.00
	A2-2e Do Not Contact	To CEL # 0.0	5.00
	A2-2f Inappropriate Contact	To CEL # 0.0	6.00
	A2-3* Leave Voice Mail #2	To CEL # 2.0	6.00
	A2-4* To Internal Sales		
	A2-4 Hand Off - No Live Contact	To CEL # 2.0	3.00
	A2-5 Calls Back To 800#		
	A2-5a No Action Needed	To CEL # 3.0	8.00
	A2-5b Do Not Contact	To CEL # 0.0	5.00
	A2-5c Inappropriate Contact	To CEL # 0.0	6.00

A2-6	**Live Conversation**	To CEL # 2.0	
	A2-6a Do Not Contact	To CEL # 0.0	5.00
	A2-6b Inappropriate Contact	To CEL # 0.0	6.00
	A2-6c Call Back 00/00/00/Time	+.040	10.00
	A2-6d Send Why XYZ Company Email	+.040	10.00
	A2-6e Send Another Brochure	+.020	6.00
	A2-6f Fax Why XYZ Company	+.020	10.00
	A2-6g Not Interested - Too Busy	To CEL # 0.0	5.00
	A2-6h Not Interested - No Need	To CEL # 0.0	5.00
	A2-6i Not Interested - Have Contract	To CEL # 0.0	5.00
	A2-6j Not Interested - No Budget	To CEL # 0.0	5.00
	A2-6k Not Interested - Don't Handle	To CEL # 0.0	5.00
	A2-6l Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
	A2-6m Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	A2-6n Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	A2-6o Not Right - Unlimited Contract	To CEL # 0.0	7.00
	A2-6p Send 1st Email Tip	To CEL # 3.0	10.00
	A2-6q Gives Influencers	+.100	10.00
	A2-6r Hand Off - Specific Ques.	To CEL # 3.0	15.00
	A2-6s Hand Off - No Appt. (Email)	To CEL # 3.0	15.00
	A2-6t Hand Off - No Appt. (Email/Inf.)	To CEL # 3.1	15.00
	A2-6u Hand Off - Phone Appt.	To CEL # 3.5	15.00
	A2-6v Hand Off - In Person Appt.	To CEL # 4.0	15.00
	A2-6w Other: See Comment Box	+.020	20.00
	A2-6x Other: See Comment Box	+.040	20.00
A2-7*	**Ongoing Thank Yous**		
	A2-7a Thank You Note	+.120	10.00
	A2-7b Thank You Email	+.090	5.00
	A2-7c Thank You Post-It Note W/ Attach.	+.120	15.00
	A2-7d Thank You T-shirt	+.180	25.00
	A2-7e Thank You Call	+.120	15.00
A2-8*	**Personal Touch**		
	A2-8 See Comment Box	+.180	30.00

A3 Promotional Direct Mail

A3-1	**Thank You To ABC Manager**	+.120	3.00
A3-2	**5-Part Mailing To Influencers**	+.150	4.00
A3-3	**Returned to Sender**		
	A3-3a Wrong	To CEL # 0.0	.35
	A3-3b Refused	To CEL # 0.0	.35

A4	Ongoing Email			
	A4-1	**Monthly Tip**	+.040	4.00
A5	Outbound Telemarketing			
	A5-1*	**Attempt Call**		
		A5-1a Disconnected/Wrong #	To CEL # 0.0	1.00
		A5-1b Busy/NA	+.000	2.00
		A5-1c Get Voice Mail	+.000	2.00
		A5-1d Gatekeeper Block	+.010	5.00
		A5-1e Do Not Contact	To CEL # 0.0	5.00
		A5-1f Inappropriate Contact	To CEL # 0.0	6.00
	A5-2*	**Leave Voice Mail #3**	+.060	6.00
		A5-2 No Action Needed		
	A5-3*	**Leave Voice Mail #4**	+.060	6.00
	A5-4*	**Send Another Brochure**	+.030	6.00
	A5-5*	**Leave Voice Mail #5**	+.060	6.00
	A5-6*	**Attempt Call**		
		A5-6a Disconnected/Wrong #	To CEL # 0.0	1.00
		A5-6b Busy/NA	+.000	2.00
		A5-6c Get Voice Mail	+.000	2.00
		A5-6d Gatekeeper Block	+.010	5.00
		A5-6e Do Not Contact	To CEL # 0.0	5.00
		A5-6f Inappropriate Contact	To CEL # 0.0	6.00
	A5-7*	**Leave Voice Mail #6**	+.060	6.00
	A5-8	**Live Conversation**		
		A5-8a Do Not Contact	To CEL # 0.0	5.00
		A5-8b Inappropriate Contact	To CEL # 0.0	6.00
		A5-8c Call Back 00/00/00/Time	+.040	10.00
		A5-8d Send Why XYZ Company Email	+.040	10.00
		A5-8e Send Another Brochure	+.020	6.00
		A5-8f Fax Why XYZ Company	+.020	10.00
		A5-8g Not Interested - Too Busy	To CEL # 0.0	5.00
		A5-8h Not Interested - No Need	To CEL # 0.0	5.00
		A5-8i Not Interested - Have Contract	To CEL # 0.0	5.00
		A5-8j Not Interested - No Budget	To CEL # 0.0	5.00
		A5-8k Not Interested - Don't Handle	To CEL # 0.0	5.00
		A5-8l Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
		A5-8m Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
		A5-8n Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
		A5-8o Not Right - Unlimited Contract	To CEL # 0.0	7.00
		A5-8p Send 1st Email Tip	To CEL # 3.0	10.00

B-6

	A5-8q	Gives Influencers	+.100	10.00
	A5-8r	Set Phone Appt. 00/00/00/Time	To CEL # 3.5	15.00
	A5-8s	Set In Person Appt. 00/00/00/Time	To CEL # 4.0	15.00
	A5-8t	Other: See Comment Box	+.020	20.00
	A5-8u	Other: See Comment Box	+.040	20.00
	A5-8v	Keep In Acquisition	+.060	10.00
A5-9*	**Ongoing Thank Yous**			
	A5-9a	Thank You Note	+.120	10.00
	A5-9b	Thank You Email	+.090	5.00
	A5-9c	Thank You Post-It W/ Attachment	+.120	15.00
	A5-9d	Thank You T-shirt	+.180	25.00
	A5-9e	Thank You Call	+.120	15.00
A5-10*	**Personal Touch**			
	A5-10	See Comment Box	+.180	30.00

A6 Inbound Telemarketing

A6-1*	**Web Response**			
	A6-1a	Contacts Us	To CEL # 3.0	8.00
	A6-1b	Do Not Contact	To CEL # 0.0	5.00
	A6-1c	Inappropriate Contact	To CEL # 0.0	6.00
	A6-1d	Mail Emergency Kit	+.150	6.00
	A6-1e	Send 1st Email Tip	+.040	10.00
	A6-1f	Call Forum Information	+.040	15.00
	A6-1g	Email Forum Information	+.040	5.00
	A6-1h	Mail Forum Information	+.040	10.00
	A6-1i	Fax Forum Information	+.040	15.00
A6-2*	**Email Response**			
	A6-2a	Contacts Us	To CEL # 3.0	8.00
	A6-2b	Do Not Contact	To CEL # 0.0	5.00
	A6-2c	Inappropriate Contact	To CEL # 0.0	6.00
	A6-2d	Send 1st Email Tip	+.040	10.00
	A6-2e	Custom Email	+.120	10.00
A6-3*	**Fax Response**			
	A6-3a	Contacts Us	To CEL # 3.0	8.00
	A6-3b	Do Not Contact	To CEL # 0.0	5.00
	A6-3c	Inappropriate Contact	To CEL # 0.0	6.00
	A6-3d	Custom Fax	+.120	15.00
A6-4*	**Snailmail Response**			
	A6-4a	Contacts Us	To CEL # 3.0	8.00
	A6-4b	Do Not Contact	To CEL # 0.0	5.00
	A6-4c	Inappropriate Contact	To CEL # 0.0	6.00
	A6-4d	Custom Snailmail	+.120	15.00

A6-5*	**Voicemail Response**		
	A6-5a Contacts Us	To CEL # 3.0	15.00
	A6-5b Do Not Contact	To CEL # 0.0	5.00
	A6-5c Inappropriate Contact	To CEL # 0.0	6.00
	A6-5d Custom Voicemail	+.090	15.00
A6-6	**Live Conversation**		
	A6-6a Do Not Contact	To CEL # 0.0	5.00
	A6-6b Inappropriate Contact	To CEL # 0.0	6.00
	A6-6c Call Back 00/00/00/Time	+.040	10.00
	A6-6d Send Why XYZ Company Email	+.040	10.00
	A6-6e Send Another Brochure	+.020	6.00
	A6-6f Fax Why XYZ Company	+.020	10.00
	A6-6g Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
	A6-6h Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	A6-6i Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	A6-6j Not Right - Unlimited Contract	To CEL # 0.0	7.00
	A6-6k Send 1st Email Tip	+.040	10.00
	A6-6l Gives Influencers	+.100	10.00
	A6-6m Set Phone Appt. 00/00/00/Time	To CEL # 3.5	15.00
	A6-6n Set In Person Appt. 00/00/00/Time	To CEL # 4.0	15.00
	A6-6o Call Forum Information	+.040	15.00
	A6-6p Email Forum Information	+.040	5.00
	A6-6q Mail Forum Information	+.040	10.00
	A6-6r Fax Forum Information	+.040	15.00
	A6-6s Other: See Comment Box	+.020	20.00
	A6-6t Other: See Comment Box	+.040	20.00
	A6-6u Keep In Acquisition	+.060	10.00
A6-7*	**Ongoing Thank Yous**		
	A6-7a Thank You Note	+.120	10.00
	A6-7b Thank You Email	+.090	5.00
	A6-7c Thank You Post-It W/ Attachment	+.120	15.00
	A6-7d Thank You T-shirt	+.180	25.00
	A6-7e Thank You Call	+.120	15.00
A6-8*	**Personal Touch**		
	A6-8 See Comment Box	+.180	30.00

Closing Interaction

C1	Presentation/Sales Kit	Starts 4.0	
C1-1*	**Initial Appointment**		
	C1-1a Confirm Appointment	+.050	30.00
	C1-1b Reschedule Appointment	+.050	40.00
	C1-1c Cancel Appointment	To CEL # 0.0	15.00
	C1-1d Appointment Voicemail	+.030	6.00
	C1-1e Contact Calls Set Appt.	+.050	20.00
	C1-1f Not Interested - Too Busy	To CEL # 0.0	5.00
	C1-1g Not Interested - No Need	To CEL # 0.0	5.00
	C1-1h Not Interested - Have Contract	To CEL # 0.0	5.00
	C1-1i Not Interested - No Budget	To CEL # 0.0	5.00
	C1-1j Not Interested - Don't Handle	To CEL # 0.0	5.00
	C1-1k Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
	C1-1l Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	C1-1m Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	C1-1n Not Right - Unlimited Contract	To CEL # 0.0	7.00
	C1-1o Not Right - Never Interested	To CEL # 0.0	7.00
	C1-1p Not Right - No Site Rt. #	To CEL # 0.0	7.00
	C1-1q Not Right - No On Contract	To CEL # 0.0	7.00
	C1-1r Not Right - Volume Too Low	To CEL # 0.0	7.00
	C1-1s Not Right - Geo. Bad	To CEL # 0.0	7.00
	C1-1t Not Right - No On ABC Gizmos	To CEL # 0.0	7.00
	C1-1u Not Right - Not Profitable	To CEL # 0.0	7.00
	C1-1v Not Right - Don't Know	To CEL # 0.0	7.00
	C1-1w Return To Acquisition	To CEL # 3.0	50.00
	C1-1x Contact CK Boss	+.040	15.00
	C1-1y Contact CK CFO	+.040	15.00
	C1-1z Contact CK Other	+.020	15.00
	C1-1aa Another Appointment Set	+.050	40.00
	C1-1bb Customer To Develop Facts	+.050	15.00
	C1-1cc Schedule Fact Finding	+.075	30.00
C1-2*	**Thank You For Appointment**		
	C1-2a Thank You Note	+.120	10.00
	C1-2b Thank You Email	+.090	5.00
	C1-2c Thank You Post-It W/Attachment	+.120	15.00
	C1-2d Thank You T-shirt	+.180	25.00
	C1-2e Thank You Call	+.120	15.00
C1-3*	**Personal Touch**		
	C1-3 See Comment Box	+.180	30.00
C1-4*	**Other**		
	C1-4a See Comment Box	+.090	30.00
	C1-4b See Comment Box	+.180	30.00

C1-5*	**Another Appointment With Others**		
	C1-5a Confirm Appointment	+.050	30.00
	C1-5b Reschedule Appointment	+.050	40.00
	C1-5c Cancel Appointment	To CEL # 0.0	15.00
	C1-5d Appointment Voicemail	+.030	6.00
	C1-5e Not Interested - Too Busy	To CEL # 0.0	5.00
	C1-5f Not Interested - No Need	To CEL # 0.0	5.00
	C1-5g Not Interested - Have Contract	To CEL # 0.0	5.00
	C1-5h Not Interested - No Budget	To CEL # 0.0	5.00
	C1-5i Not Interested - Don't Handle	To CEL # 0.0	5.00
	C1-5j Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
	C1-5k Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	C1-5l Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	C1-5m Not Right - Unlimited Contract	To CEL # 0.0	7.00
	C1-5n Not Right - Never Interested	To CEL # 0.0	7.00
	C1-5o Not Right - No Site Rt. #	To CEL # 0.0	7.00
	C1-5p Not Right - No On Contract	To CEL # 0.0	7.00
	C1-5q Not Right - Volume Too Low	To CEL # 0.0	7.00
	C1-5r Not Right - Geo. Bad	To CEL # 0.0	7.00
	C1-5s Not Right - No On ABC Gizmos	To CEL # 0.0	7.00
	C1-5t Not Right - Not Profitable	To CEL # 0.0	7.00
	C1-5u Not Right - Don't Know	To CEL # 0.0	7.00
	C1-5v Return To Acquisition	To CEL # 3.0	50.00
	C1-5w Contact CK Boss	+.040	15.00
	C1-5x Contact CK CFO	+.040	15.00
	C1-5y Contact CK Other	+.020	15.00
	C1-5z Another Appointment Set	+.050	40.00
	C1-5aa Customer To Develop Facts	+.050	15.00
	C1-5bb Schedule Fact Finding	+.075	30.00
C1-6*	**Follow Up Appointment**		
	C1-6a Call No Message Left	+.000	2.00
	C1-6b # Calls No Message Left	+.000	10.00
	C1-6c Gatekeeper Block	+.010	5.00
	C1-6d Left Voicemail	+.060	6.00
	C1-6e Call Back 00/00/00/Time	+.060	10.00
	C1-6f Later - Too Busy	+.020	5.00
	C1-6g Later - Don't Know Yet	+.020	5.00
	C1-6h Later - Wrong Time	+.020	5.00
	C1-6i Set Follow Up Meeting	+.060	40.00
	C1-6j Not Interested - Too Busy	To CEL # 0.0	5.00
	C1-6k Not Interested - No Need	To CEL # 0.0	5.00
	C1-6l Not Interested - Have Contract	To CEL # 0.0	5.00
	C1-6m Not Interested - No Budget	To CEL # 0.0	5.00
	C1-6n Not Interested - Don't Handle	To CEL # 0.0	5.00
	C1-6o Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
	C1-6p Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	C1-6q Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	C1-6r Not Right - Unlimited Contract	To CEL # 0.0	7.00
	C1-6s Not Right - Never Interested	To CEL # 0.0	7.00
	C1-6t Not Right - No Site Rt. #	To CEL # 0.0	7.00
	C1-6u Not Right - No On Contract	To CEL # 0.0	7.00

C1-6v Not Right - Don't Know	To CEL # 0.0	7.0
C1-6w Return to Acquisition	To CEL # 3.0	50.00
C1-6x Another Appointment Set	+.050	40.00
C1-6y Customer to Develop Facts	+.050	15.00
C1-6z Schedule Fact Finding	+.075	30.00

C2 Fact Finding/Evaluation

C2-1*	**Follow Up Fact Finding**		
	C2-1a Call No Message Left	+.000	2.00
	C2-1b # Calls No Message Left	+.000	10.00
	C2-1c Gatekeeper Block	+.010	5.00
	C2-1d Left Voice Mail	+.060	6.00
	C2-1e Call Back 00/00/00/Time	+.060	10.00
	C2-1f Later - Too Busy	+.020	5.00
	C2-1g Later - Don't Know Yet	+.020	5.00
	C2-1h Later - Wrong Time	+.020	5.00
	C2-1i Set Meeting To Get Facts	+.075	40.00
	C2-1j Schedule Fact Finding	+.075	30.00
C2-2*	**Basic Fact Finding**	+.100	100.00
C2-3*	**Premium Fact Finding**	+.150	200.00
C2-4*	**Set Meeting Confirm Facts**	+.075	40.00
C2-5*	**Meeting On Facts**		
	C2-5a Customer Facts Need More	-.050	150.00
	C2-5b Customer Facts Have Enough	+.050	100.00
	C2-5c Our Facts Need More	-.050	150.00
	C2-5d Our Facts Have Enough	+.050	100.00
C2-6*	**Additional Work On Facts**		
	C2-6a See Comment Box	-.075	100.00
	C2-6b See Comment Box	+.075	200.00
C2a7*	**Thank You For Facts**		
	C2-7a Thank You Note	+.120	10.00
	C2-7b Thank You Email	+.090	5.00
	C2-7c Thank You Post-It W/ Attachment	+.120	15.00
	C2-7d Thank You T-shirt	+.180	25.00
	C2-7e Thank You Call	+.120	15.00
C2-8*	**Personal Touch**		
	C2-8 See Comment Box	+.180	30.00
C2-9*	**Other**		
	C2-9a See Comment Box	+.090	30.00
	C2-9b See Comment Box	+.180	30.00

C3-1*	**Set Initial Proposal Meeting**	+.075	40.00
C3-2*	**Deliver Basic Initial Proposal**	+.100	500.00
C3-3*	**Deliver Premium Initial Proposal**	+.150	1000.00
C3-4*	**Thank You For Initial Proposal**		
	C3-4a Thank You Note	+.120	10.00
	C3-4b Thank You Email	+.090	5.00
	C3-4c Thank You Post-It W/ Attachment	+.120	15.00
	C3-4d Thank You T-shirt	+.180	25.00
	C3-4e Thank You Call	+.120	15.00
C3-5*	**Personal Touch**		
	C3-5 See Comment Box	+.180	30.00
C3-6*	**Other**		
	C3-6a See Comment Box	+.090	30.00
	C3-6b See Comment Box	+.180	30.00
C3-7*	**Follow Up Initial Proposal**		
	C3-7a Call No Message Left	+.000	2.00
	C3-7b # Calls No Message Left	+.000	10.00
	C3-7c Gatekeeper Block	+.010	5.00
	C3-7d Left Voice Mail	+.060	6.00
	C3-7e Call Back 00/00/00/Time	+.060	10.00
	C3-7f Later - Too Busy	+.020	5.00
	C3-7g Later - Don't Know Yet	+.020	5.00
	C3-7h Later - Wrong Time	+.020	5.00
	C3-7i Set Follow Up Meeting	+.060	40.00
	C3-7j Not Interested - Too Busy	To CEL # 0.0	5.00
	C3-7k Not Interested - No Need	To CEL # 0.0	5.00
	C3-7k Not Interested - Have Contract	To CEL # 0.0	5.00
	C3-7l Not Interested - No Budget	To CEL # 0.0	5.00
	C3-7m Not Interested - Don't Handle	To CEL # 0.0	5.00
	C3-7n Not Right - Not Enough Gizmos	To CEL # 0.0	5.00
	C3-7o Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	C3-7p Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	C3-7q Not Right - Unlimited Contract	To CEL # 0.0	7.00
	C3-7r Not Right - Never Interested	To CEL # 0.0	7.00
	C3-7s Not Right - No Site Rt. #	To CEL # 0.0	7.00
	C3-7t Not Right - No On Contract	To CEL # 0.0	7.00
	C3-7u Not Right - Volume Too Low	To CEL # 0.0	7.00
	C3-7v Not Right - Geo. Bad	To CEL # 0.0	7.00
	C3-7w Not Right - No On ABC Gizmos	To CEL # 0.0	7.00
	C3-7x Not Right - Not Profitable	To CEL # 0.0	7.00
	C3-7y Not Right - Don't Know	To CEL # 0.0	7.00
	C3-7z Return To Acquisition	To CEL # 3.0	50.00
	C3-7aa WANTS A CONTRACT!	To CEL # 5.0	50.00

C3-8*	**Follow Up Meeting Initial Proposal**		
	C3-8a Call Back 00/00/00/Time	+.060	10.00
	C3-8b Not Interested - Too Busy	To CEL # 0.0	5.00
	C3-8c Not Interested - No Need	To CEL # 0.0	5.00
	C3-8d Not Interested - Have Contract	To CEL # 0.0	5.00
	C3-8e Not Interested - No Budget	To CEL # 0.0	5.00
	C3-8f Not Interested - Don't Handle	To CEL # 0.0	5.00
	C3-8g Not Right - Not Enough Gizmos	To CEL # 0.0	7.00
	C3-8h Not Right - Not 3-5 Mission Critical	To CEL # 0.0	7.00
	C3-8i Not Right - Not 3-5 Noise Level	To CEL # 0.0	7.00
	C3-8j Not Right - Unlimited Contract	To CEL # 0.0	7.00
	C3-8k Not Right - Never Interested	To CEL # 0.0	7.00
	C3-8l Not Right - No Site Rt. #	To CEL # 0.0	7.00
	C3-8m Not Right - No On Contract	To CEL # 0.0	7.00
	C3-8n Not Right - Volume Too Low	To CEL # 0.0	7.00
	C3-8o Not Right - Geo. Bad	To CEL # 0.0	7.00
	C3-8p Not Right - No On ABC Gizmos	To CEL # 0.0	7.00
	C3-8q Not Right - Not Profitable	To CEL # 0.0	7.00
	C3-8r Not Right - Don't Know	To CEL # 0.0	7.00
	C3-8s Return To Acquisition	To CEL # 3.0	50.00
	C3-8t WANTS A CONTRACT!	To CEL # 5.0	50.00
C3-9*	**Thank You Follow Up**		
	C3-9a Thank You Note	+.120	10.00
	C3-9b Thank You Email	+.090	5.00
	C3-9c Thank You Post-It W/ Attachment	+.120	15.00
	C3-9d Thank You T-shirt	+.180	25.00
	C3-9e Thank You Call	+.120	15.00
C3-10*	**Personal Touch**		
	C3-10 See Comment Box	+.180	30.00
C3-11*	**Other**		
	C3-11a See Comment Box	+.090	30.00
	C3-11b See Comment Box	+.180	30.00

C4 Initial Contract

C4-1*	**Set Initial Contract Meeting**	+.075	40.00
C4-2*	**Deliver Basic Contract**	+.100	750.00
C4-3*	**Deliver Premium Contract**	+.150	750.00

C4-4*	**Thank You For Contract**		
	C4-4a Thank You Note	+.120	10.00
	C4-4b Thank You Email	+.090	5.00
	C4-4c Thank You Post-It W/ Attachment	+.120	15.00
	C4-4d Thank You T-shirt	+.180	25.00
	C4-4e Thank You Call	+.120	15.00
C4-5*	**Personal Touch**		
	C4-5 See Comment Box	+.180	30.00
C4-6*	**Other**		
	C4-6a See Comment Box	+.090	30.00
	C4-6b See Comment Box	+.180	30.00
C4-7*	**Follow Up Initial Contract**		
	C4-7a Left Voice Mail	+.060	6.00
	C4-7b Call Back 00/00/00/Time	+.060	10.00
	C4-7c Set Follow Up Meeting	+.050	40.00
	C4-7d Return To Acquisition	To CEL # 3.0	50.00
	C4-7e SIGNS CONTRACT!	To CEL # 6.0	50.00
C4-8*	**Hand Off To Customer Care**	To CEL # 7.0	100.00
C4-9*	**Hold Follow Up On Initial Contract**		
	C4-9a Call Back 00/00/00/Time	+.060	10.00
	C4-9b Return To Acquisition	To CEL # 3.0	50.00
	C4-9c SIGNS CONTRACT!	To CEL # 6.0	50.00
C4-10*	**Thank You For Follow Up**		
	C4-10a Thank You Note	+.120	10.00
	C4-10b Thank You Email	+.090	5.00
	C4-10c Thank You Post-It W/ Attachment	+.120	15.00
	C4-10d Thank You T-shirt	+.180	25.00
	C4-10e Thank You Call	+.120	15.00
C4-11*	**Personal Touch**		
	C4-11 See Comment Box	+.180	30.00
C4-12*	**Other**		
	C4-12a See Comment Box	+.090	30.00
	C4-12b See Comment Box	+.180	30.00
C4-13*	**Hand Off To Customer Care**	To CEL # 7.0	100.00

C5 Renewal Proposal

C5-1*	**Set Renewal Proposal Meeting**	+.075	40.00
C5-2*	**Deliver Basic Renewal Proposal**	+.100	350.00

C5-3*	**Deliver Premium Renewal Proposal**	+.150	750.00
C5-4*	**Thank You For Renewal Proposal**		
	C5-4a Thank You Note	+.120	10.00
	C5-4b Thank You Email	+.090	5.00
	C5-4c Thank You Post-It W/ Attachment	+.120	15.00
	C5-4d Thank You T-shirt	+.180	25.00
	C5-4e Thank You Call	+.120	15.00
C5-5*	**Personal Touch**		
	C5-5 See Comment Box	+.180	30.00
C5-6*	**Other**		
	C5-6a See Comment Box	+.090	30.00
	C5-6b See Comment Box	+.180	30.00
C5-7*	**Follow Up Renewal Proposal**		
	C5-7a Left Voice Mail	+.060	6.00
	C5-7b Call Back 00/00/00/Time	+.060	10.00
	C5-7c Set Follow Up Meeting	+.050	40.00
	C5-7d Return To Acquisition	To CEL # 3.0	50.00
	C5-7e SIGNS CONTRACT!	To CEL # 5.0	50.00
C5-8*	**Follow Up Meeting Renewal Proposal**		
	C5-8a Call Back 00/00/00 Time	+.060	10.00
	C5-8b Return To Acquisition	To CEL # 3.0	50.00
	C5-8c Wants A CONTRACT!	To CEL # 5.0	50.00
C5-9*	**Thank You For Follow Up**		
	C5-9a Thank You Note	+.120	10.00
	C5-9b Thank You Email	+.090	5.00
	C5-9c Thank You Post-It W/ Attachment	+.120	15.00
	C5-9d Thank You T-shirt	+.180	25.00
	C5-9e Thank You Call	+.120	15.00
C5-10*	**Personal Touch**		
	C5-10 See Comment Box	+. 180	30.00
C5-11*	**Other**		
	C5-11a See Comment Box	+.090	30.00
	C5-11b See Comment Box	+.180	30.00

C6 Renewal Contract

C6-1*	**Set Meeting Renewal Contract**	+.075	40.00
C6-2*	**Deliver Basic Renewal Contract**	+.100	500.00
C6-3*	**Deliver Premium Renewal Contract**	+.150	500.00

C6-4*	**Thank You For Renewal Contract**		
	C6-4a Thank You Note	+.120	10.00
	C6-4b Thank You Email	+.090	5.00
	C6-4c Thank You Post-It W/ Attachment	+.120	15.00
	C6-4d Thank You T-shirt	+.180	25.00
	C6-4e Thank You Call	+.120	15.00
C6-5*	**Personal Touch**		
	C6-5 See Comment Box	+.180	30.00
C6-6*	**Other**		
	C6-6a See Comment Box	+.090	30.00
	C6-6b See Comment Box	+.180	30.00
C6-7*	**Follow Up Renewal Contract**		
	C6-7a Left Voice Mail	+.060	6.00
	C6-7b Call Back 00/00/00/Time	+.060	10.00
	C6-7c Set Follow Up Meeting	+.050	40.00
	C6-7d Return To Acquisition	To CEL # 3.0	50.00
	C6-7e SIGNS CONTRACT!	To CEL # 6.0	50.00
C6-8*	**Hand Back To Customer Care**	To CEL # 7.0	100.00
C6-9*	**Hold Follow Up Meeting Renewal Contract**		
	C6-9a Call Back 00/00/00/Time	+.060	10.00
	C6-9b Return To Acquisition	To CEL # 3.0	50.00
	C6-9c SIGNS CONTRACT!	To CEL # 6.0	50.00
C6-10*	**Thank You For Follow Up**		
	C6-10a Thank You Note	+.120	10.00
	C6-10b Thank You Email	+.090	5.00
	C6-10c Thank You Post-It W/ Attachment	+.120	15.00
	C6-10d Thank You T-shirt	+.180	25.00
	C6-10e Thank You Call	+.120	15.00
C6-11*	**Personal Touch**	+.180	30.00
C6-12*	**Other**		
	C6-12a See Comment Box	+.090	30.00
	C6-12b See Comment Box	+.180	30.00
C6-13*	**Hand Back To Customer Care**	To CEL # 7.0	100.00

Retention Interaction

R1	Gizmo Report		Starts 7.0
	R1-1* Set Meeting Report /Survey #2	+.075	40.00
	R1-2* Basic Report /Survey #2		
	R1-2a Response Dictates	To CEL # 8.0	350.00
	R1-2b Response Dictates	To CEL # 9.0	350.00
	R1-2c Response Dictates	To CEL # 10.0	350.00
	R1-2d Response Dictates	To CEL # 11.0	350.00
	R1-2e Response Dictates	To CEL # 12.0	350.00
	R1-2f Response Dictates	To CEL # 13.0	350.00
	R1-3* Premium Report /Survey #2		
	R1-3a Response Dictates	To CEL # 8.0	750.00
	R1-3b Response Dictates	To CEL # 9.0	750.00
	R1-3c Response Dictates	To CEL # 10.0	750.00
	R1-3d Response Dictates	To CEL # 11.0	750.00
	R1-3e Response Dictates	To CEL # 12.0	750.00
	R1-3f Response Dictates	To CEL # 13.0	750.00
	R1-4* Thank You Report Meeting/Survey		
	R1-4a Thank You Note	+.125	10.00
	R1-4b Thank You Email	+.095	5.00
	R1-4c Thank You Post-It W/ Attachment	+.125	15.00
	R1-4d Thank You T-shirt	+.190	25.00
	R1-4e Thank You Call	+.125	15.00
	R1-5* Personal Touch		
	R1-5 See Comment Box	+.190	30.00
	R1-6* Other		
	R1-6a See Comment Box	+.095	30.00
	R1-6b See Comment Box	+.190	30.00
R2	Ongoing Gizmo Inventory		
	R2-1 Monthly Invoice Summary	+.060	30.00
R3	Gizmo Report Updates		
	R3-1* Set Meeting Update/Survey #3	+.075	40.00

R3-2*	**Basic Update/Survey #3**		
	R3-2a Response Dictates	To CEL # 8.0	350.00
	R3-2b Response Dictates	To CEL # 9.0	350.00
	R3-2c Response Dictates	To CEL # 10.0	350.00
	R3-2d Response Dictates	To CEL # 11.0	350.00
	R3-2e Response Dictates	To CEL # 12.0	350.00
	R3-2f Response Dictates	To CEL # 13.0	350.00
R3-3*	**Premium Update/Survey #3**		
	R3-3a Response Dictates	To CEL # 8.0	750.00
	R3-3b Response Dictates	To CEL # 9.0	750.00
	R3-3c Response Dictates	To CEL # 10.0	750.00
	R3-3d Response Dictates	To CEL # 11.0	750.00
	R3-3e Response Dictates	To CEL # 12.0	750.00
	R3-3f Response Dictates	To CEL # 13.0	750.00
R3-4*	**Thank You For Update/Survey #3**		
	R3-4a Thank You Note	+.125	10.00
	R3-4b Thank You Email	+.095	5.00
	R3-4c Thank You Post-It W/ Attachment	+.125	15.00
	R3-4d Thank You T-shirt	+.190	25.00
	R3-4e Thank You Call	+.125	15.00
R3-5*	**Personal Touch**		
	R3-5 See Comment Box	+.190	30.00
R3-6*	**Other**		
	R3-6a See Comment Box	+.095	30.00
	R3-6b See Comment Box	+.190	30.00
R3-7*	**Back To Internal Sales For Renewal**	To CEL # 5.0	100.00
R3-8*	**Other**		
	R3-8a See Comment Box	+.095	30.00
	R3-8b See Comment Box	+.190	30.00

R4 Relationship Enhancement

R4-1*	**Start Of Contract/ Survey #1**		
	R4-1a Response Dictates	To CEL # 8.0	300.00
	R4-1b Response Dictates	To CEL # 9.0	300.00
	R4-1c Response Dictates	To CEL # 10.0	300.00
	R4-1d Response Dictates	To CEL # 11.0	300.00
	R4-1e Response Dictates	To CEL # 12.0	300.00
	R4-1f Response Dictates	To CEL # 13.0	300.00

R4-2*	**Get Testimonial/ Survey #4**		
	R4-2a Response Dictates	To CEL # 8.0	1000.00
	R4-2b Response Dictates	To CEL # 9.0	1000.00
	R4-2c Response Dictates	To CEL # 10.0	1000.00
	R4-2d Response Dictates	To CEL # 11.0	1000.00
	R4-2e Response Dictates	To CEL # 12.0	1000.00
	R4-2f Response Dictates	To CEL # 13.0	1000.00
R4-3*	**Use Reference/ Survey #4**		
	R4-3a Response Dictates	To CEL # 8.0	300.00
	R4-3b Response Dictates	To CEL # 9.0	300.00
	R4-3c Response Dictates	To CEL # 10.0	300.00
	R4-3d Response Dictates	To CEL # 11.0	300.00
	R4-3e Response Dictates	To CEL # 12.0	300.00
	R4-3f Response Dictates	To CEL # 13.0	300.00
R4-4*	**Ask Referral/ Survey #4**		
	R4-4a Response Dictates	To CEL # 8.0	300.00
	R4-4b Response Dictates	To CEL # 9.0	300.00
	R4-4c Response Dictates	To CEL # 10.0	300.00
	R4-4d Response Dictates	To CEL # 11.0	300.00
	R4-4e Response Dictates	To CEL # 12.0	300.00
	R4-4f Response Dictates	To CEL # 13.0	300.00
R4-5*	**Receive Referral**	+.300	200.00
R4-6*	**Expand Contract**	+.500	500.00
R4-7*	**Set Check-In Meeting/ Survey #5**	+.075	40.00
R4-8*	**Check-In Meeting/ Survey #5**		
	R4-8a Response Dictates	To CEL # 8.0	300.00
	R4-8b Response Dictates	To CEL # 9.0	300.00
	R4-8c Response Dictates	To CEL # 10.0	300.00
	R4-8d Response Dictates	To CEL # 11.0	300.00
	R4-8e Response Dictates	To CEL # 12.0	300.00
	R4-8f No Action Needed	To CEL # 13.0	300.00
R4-9*	**Thank You Check-In Meeting/Survey #5**		
	R4-9a Thank You Note	+.125	10.00
	R4-9b Thank You Email	+.095	5.00
	R4-9c Thank You Post-It W/ Attachment	+.125	15.00
	R4-9d Thank You T-shirt	+.190	25.00
	R4-9e Thank You Call	+.125	15.00
R4-10*	**Personal Touch**		
	R4-10 See Comment Box	+.190	30.00
R4-11*	**Other**		
	R4-11a See Comment Box	+.095	30.00
	R4-11b See Comment Box	+.190	30.00

	R4-12 A Customer No More	To CEL # 0.0	1000.00
R5	Ongoing Email		
	R5-1 Monthly Tip #1 (To Add Old Customers)	+.040	4.00
R6	Ongoing Training		
	R6-1* Meeting To Plan Training/Survey #6		
	R6-1a Response Dictates	To CEL # 8.0	150.00
	R6-1b Response Dictates	To CEL # 9.0	150.00
	R6-1c Response Dictates	To CEL # 10.0	150.00
	R6-1d Response Dictates	To CEL # 11.0	150.00
	R6-1e Response Dictates	To CEL # 12.0	150.00
	R6-1f Response Dictates	To CEL # 13.0	150.00
	R6-2* Basic Training	+.060	500.00
	R6-3* Premium Training	+.120	750.00
	R6-4* Thank You For Training		
	R6-4a Thank You Note	+.125	10.00
	R6-4b Thank You Email	+.095	5.00
	R6-4c Thank You Post-It W/ Attachment	+.125	15.00
	R6-4d Thank You T-shirt	+.190	25.00
	R6-4e Thank You Call	+.125	15.00
	R6-5* Personal Touch		
	R6-5 See Comment Box	+.190	30.00
	R6-6* Other		
	R6-6a See Comment Box	+.095	30.00
	R6-6b See Comment Box	+.190	30.00
R7	Ongoing Thank Yous		
	R7-1* Other Thank You: See Comment Box		
	R7-1a Thank You Note	+.125	10.00
	R7-1b Thank You Email	+.095	5.00
	R7-1c Thank You Post-It W/ Attachment	+.125	15.00
	R7-1d Thank You T-shirt	+.190	25.00
	R7-1e Thank You Call	+.125	15.00

R8 Anniversary Celebrations

R8-1*	**Invite To Celebration**	+.075	40.00
R8-2*	**Hold 5-Year Celebration**	+.200	750.00
R8-3*	**Hold 10-Year Celebration**	+.200	1000.00
R8-4*	**Hold 15-Year Celebration**	+.200	1250.00
R8-5*	**Hold 20-Year Celebration**	+.200	1500.00
R8-6*	**Thank You For Coming**		
	R8-6a Thank You Note	+.125	10.00
	R8-6b Thank You Email	+.095	5.00
	R8-6c Thank You Post-It W/ Attachment	+.125	15.00
	R8-6d Thank You T-shirt	+.190	25.00
	R8-6e Thank You Call	+.125	15.00
R8-7*	**Personal Touch**		
	R8-7 See Comment Box	+.190	30.00
R8-8*	**Other**		
	R8-8a See Comment Box	+.095	30.00
	R8-8b See Comment Box	+.190	30.00

R9 Event

R9-1*	**Invite To Event**	+.075	40.00
R9-2*	**Hold Event**	+.170	5000.00
R9-3*	**Thank You For Coming**		
	R9-3a Thank You Note	+.125	10.00
	R9-3b Thank You Email	+.095	5.00
	R9-3c Thank You Post-It W/ Attachment	+.125	15.00
	R9-3d Thank You T-shirt	+.190	25.00
	R9-3e Thank You Call	+.125	15.00
R9-4*	**Personal Touch**		
	R9-4 See Comment Box	+.190	30.00
R9-5*	**Follow Up With Summary**	+.035	300.00
R9-6*	**Other**		
	R9-6a See Comment Box	+.095	30.00
	R9-6b See Comment Box	+.190	30.00

* Used to plan the Next Interaction with a contact.

B-21

APPENDIX - C

Strategic Brand Readiness (SBR) Factor Notes XYZ Company

The SBR Factor is used to score a company's relative market position and to quantify the risk posed by external and internal brand readiness issues. The SBR Factor is then used in financial projections to modify the risk.

The SBR factor value is portioned 20% to the Acquisition phase, 30% to the Closing phase and 50% to the Retention phase in a customer's life cycle to reflect a typical breakout of new to repeat business and to arrive at a final SBR factor in the range of + or - 10%. The Scoring Potential for these phases is shown on pages C-3 to C-8.

To arrive at the SBR Factor, management scores the present situation, or status quo, in the business (and what is likely to occur in the next two years) on twelve categories (six External and six Internal), broken out by Year One, Two and Three. An example of how XYZ Company scored Status Quo is on page C-9 and C-10. Pages C-11 to C-16 show how the business process calculated the SBR Factor. The SBR Factor for Status Quo is summarized on page C-17 in the Strategic Brand Readiness (SBR) Report by Strategy.

Later the exercise is repeated to determine the SBR Factor for the Plan (based on the New Marketing Strategy) over a three-year period. An example of how XYZ Company scored the Planned New Marketing Strategy is on page C-18 and C-19. Pages C-20 to C-25 show how the business process calculated the SBR Factor. The SBR Factor for Planned is summarized on page C-26 in the Strategic Brand Readiness (SBR) Report by Strategy.

After implementation, an Actual SBR Factor will be computed; the first year is based on what happened, the next two on projections. A summary of all the SBR Factors is kept on a Strategic Brand Readiness (SBR) Summary Report shown as a blank in Appendix E, pages E-10 and E-11.

Acquisition Scoring Potential

Strategy Applies to all Completed by XYZ Company

Scoring Factors	1.0 1.0 1.0	0.5 0.5 0.5	0.0 0.0 0.0	-0.5 -0.5 -0.5	-1.0 -1.0 -1.0	External Focus
OPPORTUNITY	YEAR	YEAR	YEAR	YEAR	YEAR	10
Customer Need	3.0 3.0 3.0 Riding a Wave	1.5 1.5 1.5 Commodity	0.0 0.0 0.0 Create Market	-1.5 -1.5 -1.5 Wishful	-3.0 -3.0 -3.0 Unknown	3
Market Size	1.0 1.0 1.0 Large	0.5 0.5 0.5 Medium	0.0 0.0 0.0 Small	-0.5 -0.5 -0.5 Have to Make It	-1.0 -1.0 -1.0 Unknown	1
Market Maturity	1.0 1.0 1.0 Growing	0.5 0.5 0.5 Emerging	0.0 0.0 0.0 Stable	-0.5 -0.5 -0.5 Shrinking	-1.0 -1.0 -1.0 Unknown	1
Competition	2.0 2.0 2.0 None	1.0 1.0 1.0 Slight	0.0 0.0 0.0 A Lot	-1.0 -1.0 -1.0 Fierce	-2.0 -2.0 -2.0 Unknown	2
Window of Opportunity	1.0 1.0 1.0 Easy	0.5 0.5 0.5 Doable	0.0 0.0 0.0 Unknown	-0.5 -0.5 -0.5 Narrow	-1.0 -1.0 -1.0 Too Wide	1
Sales Cycle	1.0 1.0 1.0 Short	0.5 0.5 0.5 Medium	0.0 0.0 0.0 Long	-0.5 -0.5 -0.5 Unknown	-1.0 -1.0 -1.0 Too Long	1
Limitations/Restrictions	1.0 1.0 1.0 None	0.5 0.5 0.5 Some	0.0 0.0 0.0 Many	-0.5 -0.5 -0.5 Severe	-1.0 -1.0 -1.0 Unknown	1
Access To Capital	0.0 0.0 0.0 Ready	0.0 0.0 0.0 Some Work	0.0 0.0 0.0 Unknown	0.0 0.0 0.0 Hard to Get	0.0 0.0 0.0 Nonexistent	0
Capacity	0.0 0.0 0.0 Plenty	0.0 0.0 0.0 Some	0.0 0.0 0.0 Oversupply	0.0 0.0 0.0 None	0.0 0.0 0.0 Unknown	0
SWING	YEAR	YEAR	YEAR	YEAR	YEAR	4
Customer Expectations Shift	2.0 2.0 2.0 Positive	1.0 1.0 1.0 Neutral	0.0 0.0 0.0 Negative	-1.0 -1.0 -1.0 Unclear	-2.0 -2.0 -2.0 Unknown	2
Innovation	1.0 1.0 1.0 Steady Flow	0.5 0.5 0.5 Proven	0.0 0.0 0.0 Leading Edge	-0.5 -0.5 -0.5 Too Late	-1.0 -1.0 -1.0 None	1
Economic Conditions	1.0 1.0 1.0 Boom	0.5 0.5 0.5 Cooking	0.0 0.0 0.0 Stable	-0.5 -0.5 -0.5 Tight	-1.0 -1.0 -1.0 Depressed	1
MUST HAVES	YEAR	YEAR	YEAR	YEAR	YEAR	5
Quality	2.0 2.0 2.0 Excellent	1.0 1.0 1.0 Good	0.0 0.0 0.0 Poor	-1.0 -1.0 -1.0 Questionable	-2.0 -2.0 -2.0 Unknown	2
Value for Price	0.0 0.0 0.0 Terrific	0.0 0.0 0.0 Acceptable	0.0 0.0 0.0 Okay	0.0 0.0 0.0 Marginal	0.0 0.0 0.0 Unknown	0
Commitment	1.0 1.0 1.0 Serious	0.5 0.5 0.5 Somewhat	0.0 0.0 0.0 So-So	-0.5 -0.5 -0.5 Unknown	-1.0 -1.0 -1.0 Nonexistent	1
Track Record	1.0 1.0 1.0 Totally Relevant	0.5 0.5 0.5 Somewhat Relevant	0.0 0.0 0.0 By Association	-0.5 -0.5 -0.5 Related	-1.0 -1.0 -1.0 None	1
Trust Worthy	0.0 0.0 0.0 Absolute	0.0 0.0 0.0 Probable	0.0 0.0 0.0 Untested	0.0 0.0 0.0 Questionable	0.0 0.0 0.0 No Way	0
Information Flow	1.0 1.0 1.0 Readily Available	0.5 0.5 0.5 Open	0.0 0.0 0.0 Upon Request	-0.5 -0.5 -0.5 Tight	-1.0 -1.0 -1.0 Secretive	1
Easy to Buy/Renew	0.0 0.0 0.0 Piece of Cake	0.0 0.0 0.0 No Problem	0.0 0.0 0.0 Relatively Easy	0.0 0.0 0.0 Takes Work	0.0 0.0 0.0 Like Pulling Teeth	0
MOMENTUM	YEAR	YEAR	YEAR	YEAR	YEAR	11
Brand Equity	3.0 3.0 3.0 Sought After	1.5 1.5 1.5 Established	0.0 0.0 0.0 Arrived	-1.5 -1.5 -1.5 Toe Hold	-3.0 -3.0 -3.0 Ignored	3
Market Share	3.0 3.0 3.0 Market Leader	1.5 1.5 1.5 Top Ten	0.0 0.0 0.0 In the Pack	-1.5 -1.5 -1.5 Bottom Feeder	-3.0 -3.0 -3.0 None	3
Customer Share	3.0 3.0 3.0 Maxed Out	1.5 1.5 1.5 Lots of Room	0.0 0.0 0.0 Tiny	-1.5 -1.5 -1.5 Just Starting	-3.0 -3.0 -3.0 None	3
# of Products/Services	2.0 2.0 2.0 Multiple, Proven	1.0 1.0 1.0 Few Proven	0.0 0.0 0.0 Only One Proven	-1.0 -1.0 -1.0 Few Unproven	-2.0 -2.0 -2.0 Only One, Unproven	2
BUZZ	YEAR	YEAR	YEAR	YEAR	YEAR	20
Reputation	5.0 5.0 5.0 Excellent	2.5 2.5 2.5 Good	0.0 0.0 0.0 Fair	-2.5 -2.5 -2.5 Poor	-5.0 -5.0 -5.0 Unknown	5
Credibility	5.0 5.0 5.0 Tons	2.5 2.5 2.5 Decent	0.0 0.0 0.0 By Association	-2.5 -2.5 -2.5 Unknown	-5.0 -5.0 -5.0 None	5
Receptivity	5.0 5.0 5.0 Eager	2.5 2.5 2.5 Open	0.0 0.0 0.0 Neutral	-2.5 -2.5 -2.5 Unknown	-5.0 -5.0 -5.0 Closed	5
Awareness	5.0 5.0 5.0 Considering	2.5 2.5 2.5 Knowledgeable	0.0 0.0 0.0 Aware	-2.5 -2.5 -2.5 Aided Aware	-5.0 -5.0 -5.0 Unaware	5
Satisfaction	0.0 0.0 0.0 Partners	0.0 0.0 0.0 Preference	0.0 0.0 0.0 Loyal	0.0 0.0 0.0 Likes	0.0 0.0 0.0 Unhappy	0
DIFFICULTY	YEAR	YEAR	YEAR	YEAR	YEAR	10
Opening	2.0 2.0 2.0 First to Market	1.0 1.0 1.0 What Already Believes	0.0 0.0 0.0 Don't Know Much	-1.0 -1.0 -1.0 Must Change Minds	-2.0 -2.0 -2.0 Take On Others	2
Difficulty of Action	1.0 1.0 1.0 Existing to Existing	0.5 0.5 0.5 New to Existing	0.0 0.0 0.0 Existing to New	-0.5 -0.5 -0.5 New to New	-1.0 -1.0 -1.0 Totally New Approach	1
Alternatives	0.0 0.0 0.0 None	0.0 0.0 0.0 Questionable	0.0 0.0 0.0 A Few	0.0 0.0 0.0 Unknown	0.0 0.0 0.0 Tons	0
Switching Costs/Acquisition	2.0 2.0 2.0 No Problem	1.0 1.0 1.0 Possible	0.0 0.0 0.0 Hassle	-1.0 -1.0 -1.0 Exposure	-2.0 -2.0 -2.0 Integral to Business	2
Switching Costs/Retention	0.0 0.0 0.0 Integral to Business	0.0 0.0 0.0 Expensive	0.0 0.0 0.0 Hassle	0.0 0.0 0.0 Possible	0.0 0.0 0.0 No Problem	0
Audience Sophistication	1.0 1.0 1.0 Wants to Believe	0.5 0.5 0.5 Top Level View	0.0 0.0 0.0 Savvy	-0.5 -0.5 -0.5 Questioning Role	-1.0 -1.0 -1.0 Unknown	1
Difficulty to Reach	1.0 1.0 1.0 Concentrated	0.5 0.5 0.5 Several Pockets	0.0 0.0 0.0 Fragmented	-0.5 -0.5 -0.5 Unclear	-1.0 -1.0 -1.0 Unknown	1
Audience Resistance	1.0 1.0 1.0 None	0.5 0.5 0.5 Slight	0.0 0.0 0.0 Unknown	-0.5 -0.5 -0.5 Fierce	-1.0 -1.0 -1.0 Inertia	1
Communication Path	2.0 2.0 2.0 Direct to User	1.0 1.0 1.0 Via Internal Influencers	0.0 0.0 0.0 Unknown	-1.0 -1.0 -1.0 Mediated by Channel	-2.0 -2.0 -2.0 Influenced by Media	2

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	YEAR			YEAR			YEAR			YEAR			YEAR			
RELATIONSHIPS																3
Strengths Of	1.0	1.0	1.0	Steller	0.5	0.5	0.5	Solid	0.0	0.0	0.0	Workable	-0.5	-0.5	-0.5	Marginal	-1.0	-1.0	-1.0	Unclear	1
Amount Of	1.0	1.0	1.0	Vast Network	0.5	0.5	0.5	Key Network	0.0	0.0	0.0	Key Players	-0.5	-0.5	-0.5	Some Players	-1.0	-1.0	-1.0	None	1
Length Of	1.0	1.0	1.0	Long Term	0.5	0.5	0.5	Comfortable	0.0	0.0	0.0	A While	-0.5	-0.5	-0.5	Relatively New	-1.0	-1.0	-1.0	Nonexistent	1
PROMISE																12
Differentiation	1.0	1.0	1.0	Clear	0.5	0.5	0.5	So-So	0.0	0.0	0.0	Competition Has It	-0.5	-0.5	-0.5	Fuzzy	-1.0	-1.0	-1.0	Unknown	1
Value Proposition	2.0	2.0	2.0	In Tune w/ Customer Appeal	1.0	1.0	1.0	Understood	0.0	0.0	0.0	Needs Educating	-1.0	-1.0	-1.0	On Another Planet	-2.0	-2.0	-2.0	Unknown	2
Offer Appeal	2.0	2.0	2.0	Speaks to Customer	1.0	1.0	1.0	Attractive	0.0	0.0	0.0	Exists	-1.0	-1.0	-1.0	Not Important	-2.0	-2.0	-2.0	Unknown	2
Positioning	2.0	2.0	2.0	Hits Appeal & Value Prop	1.0	1.0	1.0	Hits Appeal	0.0	0.0	0.0	Hits Value Proposition	-1.0	-1.0	-1.0	Misses the Mark Totally	-2.0	-2.0	-2.0	Unknown	2
Messages	1.0	1.0	1.0	Believable	0.5	0.5	0.5	Acceptable	0.0	0.0	0.0	Convoluted	-0.5	-0.5	-0.5	Unbelievable	-1.0	-1.0	-1.0	Unknown	1
Image	1.0	1.0	1.0	Consistent/Appropriate	0.5	0.5	0.5	Consistent	0.0	0.0	0.0	Appropriate	-0.5	-0.5	-0.5	Out of Touch	-1.0	-1.0	-1.0	Unknown	1
Supporting Facts	1.0	1.0	1.0	Great Back Up	0.5	0.5	0.5	Reasonable	0.0	0.0	0.0	Stretching It	-0.5	-0.5	-0.5	Questionable	-1.0	-1.0	-1.0	Smoke 'n' Mirrors	1
Content Complexity	1.0	1.0	1.0	KISS	0.5	0.5	0.5	8th Grade	0.0	0.0	0.0	High School	-0.5	-0.5	-0.5	College	-1.0	-1.0	-1.0	PhD	1
Content Depth	1.0	1.0	1.0	Enough to Convince	0.5	0.5	0.5	Enough to Act	0.0	0.0	0.0	Thin	-0.5	-0.5	-0.5	Too Much	-1.0	-1.0	-1.0	Unknown	1
DELIVERY																1
Overall Contact	1.0	1.0	1.0	Take Ownership	0.5	0.5	0.5	Helpful	0.0	0.0	0.0	Approachable	-0.5	-0.5	-0.5	It's a Job	-1.0	-1.0	-1.0	Disgruntled	1
Sales Process	0.0	0.0	0.0	Enjoyable	0.0	0.0	0.0	Smooth	0.0	0.0	0.0	Okay	0.0	0.0	0.0	Pressured	0.0	0.0	0.0	Unknown	0
Fulfillment	0.0	0.0	0.0	Exceeds Expectations	0.0	0.0	0.0	As Promised	0.0	0.0	0.0	No Fanfare	0.0	0.0	0.0	Haphazard	0.0	0.0	0.0	Takes Forever	0
Use of Products/Services	0.0	0.0	0.0	Hassle-free	0.0	0.0	0.0	Reliable	0.0	0.0	0.0	So-So	0.0	0.0	0.0	A Pain	0.0	0.0	0.0	Unknown	0
Cust Service/Tech Support	0.0	0.0	0.0	Authority to Make Right	0.0	0.0	0.0	Superior	0.0	0.0	0.0	Responsive	0.0	0.0	0.0	Accessible	0.0	0.0	0.0	Couldn't Care	0
Community	0.0	0.0	0.0	Integral	0.0	0.0	0.0	Acceptable	0.0	0.0	0.0	Hit or Miss	0.0	0.0	0.0	Poorly Executed	0.0	0.0	0.0	Nonexistent	0
INTERACTION																4
Exchange	1.0	1.0	1.0	Easy, Welcome	0.5	0.5	0.5	Encouraged	0.0	0.0	0.0	Okay	-0.5	-0.5	-0.5	Put Up With It	-1.0	-1.0	-1.0	Cut Off	1
Listening	1.0	1.0	1.0	Built In	0.5	0.5	0.5	Extra Mile	0.0	0.0	0.0	Occasional	-0.5	-0.5	-0.5	Lip Service	-1.0	-1.0	-1.0	Nonexistent	1
Follow Through	2.0	2.0	2.0	Unbelievable	1.0	1.0	1.0	Acts On Feedback	0.0	0.0	0.0	Reliable	-1.0	-1.0	-1.0	Inconsistent	-2.0	-2.0	-2.0	Forget It	2
TLC	0.0	0.0	0.0	Authentic	0.0	0.0	0.0	Flowing	0.0	0.0	0.0	Now and Then	0.0	0.0	0.0	Forced	0.0	0.0	0.0	What's This	0
Recognition	0.0	0.0	0.0	In Every Way	0.0	0.0	0.0	Special Treatment	0.0	0.0	0.0	Once In a While	0.0	0.0	0.0	Never	0.0	0.0	0.0	No Way	0
SUFFICIENT RESOURCES																10
Time Spent	2.0	2.0	2.0	Enough to Leverage	1.0	1.0	1.0	Good Penetration	0.0	0.0	0.0	Adequate for 1st Round	-1.0	-1.0	-1.0	A Little Short	-2.0	-2.0	-2.0	Not Enough	2
Money Available	1.0	1.0	1.0	Plenty	0.5	0.5	0.5	Adequate	0.0	0.0	0.0	Compromised	-0.5	-0.5	-0.5	Just Barely Enough	-1.0	-1.0	-1.0	Too Little	1
Program Quality	1.0	1.0	1.0	Classic	0.5	0.5	0.5	Staying Power	0.0	0.0	0.0	Sticky	-0.5	-0.5	-0.5	Short Termer	-1.0	-1.0	-1.0	One Shot	1
People Expertise	2.0	2.0	2.0	Pros	1.0	1.0	1.0	Fit for Task	0.0	0.0	0.0	Average	-1.0	-1.0	-1.0	Stretching It	-2.0	-2.0	-2.0	Asking Too Much	2
Process	2.0	2.0	2.0	Closed Loop	1.0	1.0	1.0	Integrated	0.0	0.0	0.0	Some Coordination	-1.0	-1.0	-1.0	Silos Only	-2.0	-2.0	-2.0	Nonexistent	2
Technology	2.0	2.0	2.0	Personally Empowering	1.0	1.0	1.0	High Tech, Tech Touch	0.0	0.0	0.0	Advanced Automation	-1.0	-1.0	-1.0	Some Automation	-2.0	-2.0	-2.0	Behind	2
SYNERGY																10
Campaign	5.0	5.0	5.0	Leverage	2.5	2.5	2.5	Integrated	0.0	0.0	0.0	Neutral	-2.5	-2.5	-2.5	Helter Skelter	-5.0	-5.0	-5.0	Opposing	5
Channel	2.0	2.0	2.0	Seamless	1.0	1.0	1.0	Complementary	0.0	0.0	0.0	Open	-1.0	-1.0	-1.0	Disarray	-2.0	-2.0	-2.0	In Conflict	2
Product/Service	1.0	1.0	1.0	Active Up Sell / Cross Sell	0.5	0.5	0.5	Customer Migration Path	0.0	0.0	0.0	Passive Up Sell / Cross Sell	-0.5	-0.5	-0.5	Unknown	-1.0	-1.0	-1.0	Disparate	1
Team	2.0	2.0	2.0	Breakthrough Results	1.0	1.0	1.0	Flawless Execution	0.0	0.0	0.0	Works Well	-1.0	-1.0	-1.0	Don't Talk	-2.0	-2.0	-2.0	Dysfunctional	2

Instructions: First Score Year 1 Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Closing Scoring Potential

Strategy Applies to all

Completed by XYZ Company

Scoring Factors 1.0 1.0 1.0 | 0.5 0.5 0.5 | 0.0 0.0 0.0 | -0.5 -0.5 -0.5 | -1.0 -1.0 -1.0

	YEAR				YEAR				YEAR				YEAR				YEAR				External Focus
OPPORTUNITY																					
Customer Need	2.0	2.0	2.0	Riding a Wave	1.0	1.0	1.0	Commodity	0.0	0.0	0.0	Create Market	-1.0	-1.0	-1.0	Wishful	-2.0	-2.0	-2.0	Unknown	7
Market Size	0.0	0.0	0.0	Large	0.0	0.0	0.0	Medium	0.0	0.0	0.0	Small	0.0	0.0	0.0	Have to Make It	0.0	0.0	0.0	Unknown	2
Market Maturity	0.0	0.0	0.0	Growing	0.0	0.0	0.0	Emerging	0.0	0.0	0.0	Stable	0.0	0.0	0.0	Shrinking	0.0	0.0	0.0	Unknown	0
Competition	2.0	2.0	2.0	None	1.0	1.0	1.0	Slight	0.0	0.0	0.0	A Lot	-1.0	-1.0	-1.0	Fierce	-2.0	-2.0	-2.0	Unknown	2
Window of Opportunity	0.0	0.0	0.0	Easy	0.0	0.0	0.0	Doable	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Narrow	0.0	0.0	0.0	Too Wide	0
Sales Cycle	2.0	2.0	2.0	Short	1.0	1.0	1.0	Medium	0.0	0.0	0.0	Long	-1.0	-1.0	-1.0	Unknown	-2.0	-2.0	-2.0	Too Long	2
Limitations/Restrictions	1.0	1.0	1.0	None	0.5	0.5	0.5	Some	0.0	0.0	0.0	Many	-0.5	-0.5	-0.5	Severe	-1.0	-1.0	-1.0	Unknown	1
Access To Capital	0.0	0.0	0.0	Ready	0.0	0.0	0.0	Some Work	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Hard to Get	0.0	0.0	0.0	Nonexistent	0
Capacity	0.0	0.0	0.0	Plenty	0.0	0.0	0.0	Some	0.0	0.0	0.0	Oversupply	0.0	0.0	0.0	None	0.0	0.0	0.0	Unknown	0
SWING																					
Customer Expectations Shift	1.0	1.0	1.0	Positive	0.5	0.5	0.5	Neutral	0.0	0.0	0.0	Negative	-0.5	-0.5	-0.5	Unclear	-1.0	-1.0	-1.0	Unknown	5
Innovation	1.0	1.0	1.0	Steady Flow	0.5	0.5	0.5	Proven	0.0	0.0	0.0	Leading Edge	-0.5	-0.5	-0.5	Too Late	-1.0	-1.0	-1.0	None	1
Economic Conditions	3.0	3.0	3.0	Boom	1.5	1.5	1.5	Cooking	0.0	0.0	0.0	Stable	-1.5	-1.5	-1.5	Tight	-3.0	-3.0	-3.0	Depressed	1
MUST HAVES																					3
Quality	3.0	3.0	3.0	Excellent	1.5	1.5	1.5	Good	0.0	0.0	0.0	Poor	-1.5	-1.5	-1.5	Questionable	-3.0	-3.0	-3.0	Unknown	14
Value for Price	3.0	3.0	3.0	Terrific	1.5	1.5	1.5	Acceptable	0.0	0.0	0.0	Okay	-1.5	-1.5	-1.5	Marginal	-3.0	-3.0	-3.0	Unknown	3
Commitment	1.0	1.0	1.0	Serious	0.5	0.5	0.5	Somewhat	0.0	0.0	0.0	So-So	-0.5	-0.5	-0.5	Unknown	-1.0	-1.0	-1.0	Nonexistent	3
Track Record	1.0	1.0	1.0	Totally Relevant	0.5	0.5	0.5	Somewhat Relevant	0.0	0.0	0.0	By Association	-0.5	-0.5	-0.5	Related	-1.0	-1.0	-1.0	None	1
Trust Worthy	1.0	1.0	1.0	Absolute	0.5	0.5	0.5	Probable	0.0	0.0	0.0	Untested	-0.5	-0.5	-0.5	Questionable	-1.0	-1.0	-1.0	No Way	1
Information Flow	2.0	2.0	2.0	Readily Available	1.0	1.0	1.0	Open	0.0	0.0	0.0	Upon Request	-1.0	-1.0	-1.0	Tight	-2.0	-2.0	-2.0	Secretive	1
Easy to Buy/Renew	3.0	3.0	3.0	Piece of Cake	1.5	1.5	1.5	No Problem	0.0	0.0	0.0	Relatively Easy	-1.5	-1.5	-1.5	Takes Work	-3.0	-3.0	-3.0	Like Pulling Teeth	2
MOMENTUM																					3
Brand Equity	2.0	2.0	2.0	Sought After	1.0	1.0	1.0	Established	0.0	0.0	0.0	Arrived	-1.0	-1.0	-1.0	Toe Hold	-2.0	-2.0	-2.0	Ignored	8
Market Share	2.0	2.0	2.0	Market Leader	1.0	1.0	1.0	Top Ten	0.0	0.0	0.0	In the Pack	-1.0	-1.0	-1.0	Bottom Feeder	-2.0	-2.0	-2.0	None	2
Customer Share	2.0	2.0	2.0	Maxed Out	1.0	1.0	1.0	Lots of Room	0.0	0.0	0.0	Tiny	-1.0	-1.0	-1.0	Just Starting	-2.0	-2.0	-2.0	None	2
# of Products/Services	2.0	2.0	2.0	Multiple, Proven	1.0	1.0	1.0	Few Proven	0.0	0.0	0.0	Only One Proven	-1.0	-1.0	-1.0	Few Unproven	-2.0	-2.0	-2.0	Only One, Unproven	2
BUZZ																					2
Reputation	4.0	4.0	4.0	Excellent	2.0	2.0	2.0	Good	0.0	0.0	0.0	Fair	-2.0	-2.0	-2.0	Poor	-4.0	-4.0	-4.0	Unknown	16
Credibility	4.0	4.0	4.0	Tons	2.0	2.0	2.0	Decent	0.0	0.0	0.0	By Association	-2.0	-2.0	-2.0	Unknown	-4.0	-4.0	-4.0	None	4
Receptivity	4.0	4.0	4.0	Eager	2.0	2.0	2.0	Open	0.0	0.0	0.0	Neutral	-2.0	-2.0	-2.0	Unknown	-4.0	-4.0	-4.0	Closed	4
Awareness	4.0	4.0	4.0	Considering	2.0	2.0	2.0	Knowledgeable	0.0	0.0	0.0	Aware	-2.0	-2.0	-2.0	Aided Aware	-4.0	-4.0	-4.0	Unaware	4
Satisfaction	0.0	0.0	0.0	Partners	0.0	0.0	0.0	Preference	0.0	0.0	0.0	Loyal	0.0	0.0	0.0	Likes	0.0	0.0	0.0	Unhappy	0
DIFFICULTY																					10
Opening	1.0	1.0	1.0	First to Market	0.5	0.5	0.5	What Already Believes	0.0	0.0	0.0	Don't Know Much	-0.5	-0.5	-0.5	Must Change Minds	-1.0	-1.0	-1.0	Take On Others	1
Difficulty of Action	1.0	1.0	1.0	Existing to Existing	0.5	0.5	0.5	New to Existing	0.0	0.0	0.0	Existing to New	-0.5	-0.5	-0.5	New to New	-1.0	-1.0	-1.0	Totally New Approach	1
Alternatives	2.0	2.0	2.0	None	1.0	1.0	1.0	Questionable	0.0	0.0	0.0	A Few	-1.0	-1.0	-1.0	Unknown	-2.0	-2.0	-2.0	Tons	2
Switching Costs/Acquisition	2.0	2.0	2.0	No Problem	1.0	1.0	1.0	Possible	0.0	0.0	0.0	Hassle	-1.0	-1.0	-1.0	Exposure	-2.0	-2.0	-2.0	Integral to Business	2
Switching Costs/Retention	0.0	0.0	0.0	Integral to Business	0.0	0.0	0.0	Expensive	0.0	0.0	0.0	Hassle	0.0	0.0	0.0	Possible	0.0	0.0	0.0	No Problem	0
Audience Sophistication	1.0	1.0	1.0	Wants to Believe	0.5	0.5	0.5	Top Level View	0.0	0.0	0.0	Savvy	-0.5	-0.5	-0.5	Questioning Role	-1.0	-1.0	-1.0	Unknown	1
Difficulty to Reach	0.0	0.0	0.0	Concentrated	0.0	0.0	0.0	Several Pockets	0.0	0.0	0.0	Fragmented	0.0	0.0	0.0	Unclear	0.0	0.0	0.0	Unknown	0
Audience Resistance	2.0	2.0	2.0	None	1.0	1.0	1.0	Slight	0.0	0.0	0.0	Unknown	-1.0	-1.0	-1.0	Fierce	-2.0	-2.0	-2.0	Inertia	2
Communication Path	1.0	1.0	1.0	Direct to User	0.5	0.5	0.5	Via Internal Influencers	0.0	0.0	0.0	Unknown	-0.5	-0.5	-0.5	Mediated by Channel	-1.0	-1.0	-1.0	Influenced by Media	1

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Closing Scoring Potential -- CONTINUED

	YEAR			YEAR			YEAR			YEAR			YEAR			
RELATIONSHIPS																
Strengths Of	2.0	2.0	2.0	Steller	1.0	1.0	1.0	Solid	0.0	0.0	0.0	Workable	-1.0	-1.0	-1.0	Marginal	-2.0	-2.0	-2.0	Unclear	7
Amount Of	3.0	3.0	3.0	Vast Network	1.5	1.5	1.5	Key Network	0.0	0.0	0.0	Key Players	-1.5	-1.5	-1.5	Some Players	-3.0	-3.0	-3.0	None	2
Length Of	2.0	2.0	2.0	Long Term	1.0	1.0	1.0	Comfortable	0.0	0.0	0.0	A While	-1.0	-1.0	-1.0	Relatively New	-2.0	-2.0	-2.0	Nonexistent	3
																					2
PROMISE																					
Differentiation	1.0	1.0	1.0	Clear	0.5	0.5	0.5	So-So	0.0	0.0	0.0	Competition Has It	-0.5	-0.5	-0.5	Fuzzy	-1.0	-1.0	-1.0	Unknown	8
Value Proposition	1.0	1.0	1.0	In Tune w/ Customer Appeal	0.5	0.5	0.5	Understood	0.0	0.0	0.0	Needs Educating	-0.5	-0.5	-0.5	On Another Planet	-1.0	-1.0	-1.0	Unknown	1
Offer Appeal	2.0	2.0	2.0	Speaks to Customer	1.0	1.0	1.0	Attractive	0.0	0.0	0.0	Exists	-1.0	-1.0	-1.0	Not Important	-2.0	-2.0	-2.0	Unknown	1
Positioning	1.0	1.0	1.0	Hits Appeal & Value Prop	0.5	0.5	0.5	Hits Appeal	0.0	0.0	0.0	Hits Value Proposition	-0.5	-0.5	-0.5	Misses the Mark Totally	-1.0	-1.0	-1.0	Unknown	2
Messages	0.0	0.0	0.0	Believable	0.0	0.0	0.0	Acceptable	0.0	0.0	0.0	Convoluted	0.0	0.0	0.0	Unbelievable	0.0	0.0	0.0	Unknown	1
Image	0.0	0.0	0.0	Consistent/Appropriate	0.0	0.0	0.0	Consistent	0.0	0.0	0.0	Appropriate	0.0	0.0	0.0	Out of Touch	0.0	0.0	0.0	Unknown	0
Supporting Facts	2.0	2.0	2.0	Great Back Up	1.0	1.0	1.0	Reasonable	0.0	0.0	0.0	Stretching It	-1.0	-1.0	-1.0	Questionable	-2.0	-2.0	-2.0	Smoke 'n' Mirrors	0
Content Complexity	0.0	0.0	0.0	KISS	0.0	0.0	0.0	8th Grade	0.0	0.0	0.0	High School	0.0	0.0	0.0	College	0.0	0.0	0.0	PhD	2
Content Depth	1.0	1.0	1.0	Enough to Convince	0.5	0.5	0.5	Enough to Act	0.0	0.0	0.0	Thin	-0.5	-0.5	-0.5	Too Much	-1.0	-1.0	-1.0	Unknown	0
																					1
DELIVERY																					
Overall Contact	2.0	2.0	2.0	Take Ownership	1.0	1.0	1.0	Helpful	0.0	0.0	0.0	Approachable	-1.0	-1.0	-1.0	It's a Job	-2.0	-2.0	-2.0	Disgruntled	6
Sales Process	4.0	4.0	4.0	Enjoyable	2.0	2.0	2.0	Smooth	0.0	0.0	0.0	Okay	-2.0	-2.0	-2.0	Pressured	-4.0	-4.0	-4.0	Unknown	2
Fulfillment	0.0	0.0	0.0	Exceeds Expectations	0.0	0.0	0.0	As Promised	0.0	0.0	0.0	No Fanfare	0.0	0.0	0.0	Haphazard	0.0	0.0	0.0	Takes Forever	4
Use of Products/Services	0.0	0.0	0.0	Hassle-free	0.0	0.0	0.0	Reliable	0.0	0.0	0.0	So-So	0.0	0.0	0.0	A Pain	0.0	0.0	0.0	Unknown	0
Cust Service/Tech Support	0.0	0.0	0.0	Authority to Make Right	0.0	0.0	0.0	Superior	0.0	0.0	0.0	Responsive	0.0	0.0	0.0	Accessible	0.0	0.0	0.0	Couldn't Care	0
Community	0.0	0.0	0.0	Integral	0.0	0.0	0.0	Acceptable	0.0	0.0	0.0	Hit or Miss	0.0	0.0	0.0	Poorly Executed	0.0	0.0	0.0	Nonexistent	0
																					0
INTERACTION																					
Exchange	2.0	2.0	2.0	Easy, Welcome	1.0	1.0	1.0	Encouraged	0.0	0.0	0.0	Okay	-1.0	-1.0	-1.0	Put Up With It	-2.0	-2.0	-2.0	Cut Off	6
Listening	2.0	2.0	2.0	Built In	1.0	1.0	1.0	Extra Mile	0.0	0.0	0.0	Occasional	-1.0	-1.0	-1.0	Lip Service	-2.0	-2.0	-2.0	Nonexistent	2
Follow Through	2.0	2.0	2.0	Unbelievable	1.0	1.0	1.0	Acts On Feedback	0.0	0.0	0.0	Reliable	-1.0	-1.0	-1.0	Inconsistent	-2.0	-2.0	-2.0	Forget It	2
TLC	0.0	0.0	0.0	Authentic	0.0	0.0	0.0	Flowing	0.0	0.0	0.0	Now and Then	0.0	0.0	0.0	Forced	0.0	0.0	0.0	What's This	2
Recognition	0.0	0.0	0.0	In Every Way	0.0	0.0	0.0	Special Treatment	0.0	0.0	0.0	Once in a While	0.0	0.0	0.0	Never	0.0	0.0	0.0	No Way	0
																					0
SUFFICIENT RESOURCES																					
Time Spent	2.0	2.0	2.0	Enough to Leverage	1.0	1.0	1.0	Good Penetration	0.0	0.0	0.0	Adequate for 1st Round	-1.0	-1.0	-1.0	A Little Short	-2.0	-2.0	-2.0	Not Enough	6
Money Available	1.0	1.0	1.0	Plenty	0.5	0.5	0.5	Adequate	0.0	0.0	0.0	Compromised	-0.5	-0.5	-0.5	Just Barely Enough	-1.0	-1.0	-1.0	Too Little	2
Program Quality	0.0	0.0	0.0	Classic	0.0	0.0	0.0	Staying Power	0.0	0.0	0.0	Sticky	0.0	0.0	0.0	Short Termer	0.0	0.0	0.0	One Shot	1
People Expertise	2.0	2.0	2.0	Pros	1.0	1.0	1.0	Fit for Task	0.0	0.0	0.0	Average	-1.0	-1.0	-1.0	Stretching It	-2.0	-2.0	-2.0	Asking Too Much	0
Process	1.0	1.0	1.0	Closed Loop	0.5	0.5	0.5	Integrated	0.0	0.0	0.0	Some Coordination	-0.5	-0.5	-0.5	Silos Only	-1.0	-1.0	-1.0	Nonexistent	2
Technology	0.0	0.0	0.0	Personally Empowering	0.0	0.0	0.0	High Tech, Tech Touch	0.0	0.0	0.0	Advanced Automation	0.0	0.0	0.0	Some Automation	0.0	0.0	0.0	Behind	1
																					0
SYNERGY																					
Campaign	1.0	1.0	1.0	Leverage	0.5	0.5	0.5	Integrated	0.0	0.0	0.0	Neutral	-0.5	-0.5	-0.5	Helter Skelter	-1.0	-1.0	-1.0	Opposing	7
Channel	3.0	3.0	3.0	Seamless	1.5	1.5	1.5	Complementary	0.0	0.0	0.0	Open	-1.5	-1.5	-1.5	Disarray	-3.0	-3.0	-3.0	In Conflict	1
Product/Service	2.0	2.0	2.0	Active Up Sell / Cross Sell	1.0	1.0	1.0	Customer Migration Path	0.0	0.0	0.0	Passive Up Sell / Cross Sell	-1.0	-1.0	-1.0	Unknown	-2.0	-2.0	-2.0	Disparate	3
Team	1.0	1.0	1.0	Breakthrough Results	0.5	0.5	0.5	Flawless Execution	0.0	0.0	0.0	Works Well	-0.5	-0.5	-0.5	Don't Talk	-1.0	-1.0	-1.0	Dysfunctional	2
																					1

Instructions: First Score Year 1. Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Retention Scoring Potential

Strategy Applies to all

Completed by XYZ Company

Scoring Factors 1.0 1.0 1.0 | 0.5 0.5 0.5 | 0.0 0.0 0.0 | -0.5 -0.5 -0.5 | -1.0 -1.0 -1.0

	YEAR				YEAR				YEAR				YEAR				YEAR				External Focus
OPPORTUNITY																					
Customer Need	0.0	0.0	0.0	Riding a Wave	0.0	0.0	0.0	Commodity	0.0	0.0	0.0	Create Market	0.0	0.0	0.0	Wishful	0.0	0.0	0.0	Unknown	4
Market Size	0.0	0.0	0.0	Large	0.0	0.0	0.0	Medium	0.0	0.0	0.0	Small	0.0	0.0	0.0	Have to Make It	0.0	0.0	0.0	Unknown	0
Market Maturity	0.0	0.0	0.0	Growing	0.0	0.0	0.0	Emerging	0.0	0.0	0.0	Stable	0.0	0.0	0.0	Shrinking	0.0	0.0	0.0	Unknown	0
Competition	2.0	2.0	2.0	None	1.0	1.0	1.0	Slight	0.0	0.0	0.0	A Lot	-1.0	-1.0	-1.0	Fierce	-2.0	-2.0	-2.0	Unknown	2
Window of Opportunity	0.0	0.0	0.0	Easy	0.0	0.0	0.0	Doable	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Narrow	0.0	0.0	0.0	Too Wide	0
Sales Cycle	0.0	0.0	0.0	Short	0.0	0.0	0.0	Medium	0.0	0.0	0.0	Long	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Too Long	0
Limitations/Restrictions	0.0	0.0	0.0	None	0.0	0.0	0.0	Some	0.0	0.0	0.0	Many	0.0	0.0	0.0	Severe	0.0	0.0	0.0	Unknown	0
Access To Capital	1.0	1.0	1.0	Ready	0.5	0.5	0.5	Some Work	0.0	0.0	0.0	Unknown	-0.5	-0.5	-0.5	Hard to Get	-1.0	-1.0	-1.0	Nonexistent	1
Capacity	1.0	1.0	1.0	Plenty	0.5	0.5	0.5	Some	0.0	0.0	0.0	Oversupply	-0.5	-0.5	-0.5	None	-1.0	-1.0	-1.0	Unknown	1
SWING																					
Customer Expectations Shift	3.0	3.0	3.0	Positive	1.5	1.5	1.5	Neutral	0.0	0.0	0.0	Negative	-1.5	-1.5	-1.5	Unclear	-3.0	-3.0	-3.0	Unknown	5
Innovation	1.0	1.0	1.0	Steady Flow	0.5	0.5	0.5	Proven	0.0	0.0	0.0	Leading Edge	-0.5	-0.5	-0.5	Too Late	-1.0	-1.0	-1.0	None	3
Economic Conditions	1.0	1.0	1.0	Boom	0.5	0.5	0.5	Cooking	0.0	0.0	0.0	Stable	-0.5	-0.5	-0.5	Tight	-1.0	-1.0	-1.0	Depressed	1
MUST HAVES																					
Quality	2.0	2.0	2.0	Excellent	1.0	1.0	1.0	Good	0.0	0.0	0.0	Poor	-1.0	-1.0	-1.0	Questionable	-2.0	-2.0	-2.0	Unknown	12
Value for Price	4.0	4.0	4.0	Terrific	2.0	2.0	2.0	Acceptable	0.0	0.0	0.0	Okay	-2.0	-2.0	-2.0	Marginal	-4.0	-4.0	-4.0	Unknown	2
Commitment	0.0	0.0	0.0	Serious	0.0	0.0	0.0	Somewhat	0.0	0.0	0.0	So-So	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Nonexistent	4
Track Record	0.0	0.0	0.0	Totally Relevant	0.0	0.0	0.0	Somewhat Relevant	0.0	0.0	0.0	By Association	0.0	0.0	0.0	Related	0.0	0.0	0.0	None	0
Trust Worthy	2.0	2.0	2.0	Absolute	1.0	1.0	1.0	Probable	0.0	0.0	0.0	Untested	-1.0	-1.0	-1.0	Questionable	-2.0	-2.0	-2.0	No Way	0
Information Flow	2.0	2.0	2.0	Readily Available	1.0	1.0	1.0	Open	0.0	0.0	0.0	Upon Request	-1.0	-1.0	-1.0	Tight	-2.0	-2.0	-2.0	Secretive	2
Easy to Buy/Renew	2.0	2.0	2.0	Piece of Cake	1.0	1.0	1.0	No Problem	0.0	0.0	0.0	Relatively Easy	-1.0	-1.0	-1.0	Takes Work	-2.0	-2.0	-2.0	Like Pulling Teeth	2
MOMENTUM																					
Brand Equity	1.0	1.0	1.0	Sought After	0.5	0.5	0.5	Established	0.0	0.0	0.0	Arrived	-0.5	-0.5	-0.5	Toe Hold	-1.0	-1.0	-1.0	Ignored	4
Market Share	1.0	1.0	1.0	Market Leader	0.5	0.5	0.5	Top Ten	0.0	0.0	0.0	In the Pack	-0.5	-0.5	-0.5	Bottom Feeder	-1.0	-1.0	-1.0	None	1
Customer Share	1.0	1.0	1.0	Maxed Out	0.5	0.5	0.5	Lots of Room	0.0	0.0	0.0	Tiny	-0.5	-0.5	-0.5	Just Starting	-1.0	-1.0	-1.0	None	1
# of Products/Services	1.0	1.0	1.0	Multiple, Proven	0.5	0.5	0.5	Few Proven	0.0	0.0	0.0	Only One Proven	-0.5	-0.5	-0.5	Few Unproven	-1.0	-1.0	-1.0	Only One, Unproven	1
BUZZ																					
Reputation	0.0	0.0	0.0	Excellent	0.0	0.0	0.0	Good	0.0	0.0	0.0	Fair	0.0	0.0	0.0	Poor	0.0	0.0	0.0	Unknown	5
Credibility	1.0	1.0	1.0	Tons	0.5	0.5	0.5	Decent	0.0	0.0	0.0	By Association	-0.5	-0.5	-0.5	Unknown	-1.0	-1.0	-1.0	None	0
Receptivity	0.0	0.0	0.0	Eager	0.0	0.0	0.0	Open	0.0	0.0	0.0	Neutral	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Closed	1
Awareness	0.0	0.0	0.0	Considering	0.0	0.0	0.0	Knowledgeable	0.0	0.0	0.0	Aware	0.0	0.0	0.0	Aided Aware	0.0	0.0	0.0	Unaware	0
Satisfaction	4.0	4.0	4.0	Partners	2.0	2.0	2.0	Preference	0.0	0.0	0.0	Loyal	-2.0	-2.0	-2.0	Likes	-4.0	-4.0	-4.0	Unhappy	0
DIFFICULTY																					
Opening	0.0	0.0	0.0	First to Market	0.0	0.0	0.0	What Already Believes	0.0	0.0	0.0	Don't Know Much	0.0	0.0	0.0	Must Change Minds	0.0	0.0	0.0	Take On Others	10
Difficulty of Action	0.0	0.0	0.0	Existing to Existing	0.0	0.0	0.0	New to Existing	0.0	0.0	0.0	Existing to New	0.0	0.0	0.0	New to New	0.0	0.0	0.0	Totally New Approach	0
Alternatives	3.0	3.0	3.0	None	1.5	1.5	1.5	Questionable	0.0	0.0	0.0	A Few	-1.5	-1.5	-1.5	Unknown	-3.0	-3.0	-3.0	Tons	0
Switching Costs/Acquisition	0.0	0.0	0.0	No Problem	0.0	0.0	0.0	Possible	0.0	0.0	0.0	Hassle	0.0	0.0	0.0	Exposure	0.0	0.0	0.0	Integral to Business	3
Switching Costs/Retention	7.0	7.0	7.0	Integral to Business	3.5	3.5	3.5	Expensive	0.0	0.0	0.0	Hassle	-3.5	-3.5	-3.5	Possible	-7.0	-7.0	-7.0	No Problem	0
Audience Sophistication	0.0	0.0	0.0	Wants to Believe	0.0	0.0	0.0	Top Level View	0.0	0.0	0.0	Savvy	0.0	0.0	0.0	Questioning Role	0.0	0.0	0.0	Unknown	7
Difficulty to Reach	0.0	0.0	0.0	Concentrated	0.0	0.0	0.0	Several Pockets	0.0	0.0	0.0	Fragmented	0.0	0.0	0.0	Unclear	0.0	0.0	0.0	Unknown	0
Audience Resistance	0.0	0.0	0.0	None	0.0	0.0	0.0	Slight	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Fierce	0.0	0.0	0.0	Unknown	0
Communication Path	0.0	0.0	0.0	Direct to User	0.0	0.0	0.0	Via Internal Influencers	0.0	0.0	0.0	Unknown	0.0	0.0	0.0	Mediated by Channel	0.0	0.0	0.0	Inertia	0
																				Influenced by Media	0

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Retention Scoring Potential --CONTINUED

	YEAR										
RELATIONSHIPS											
Strengths Of	3.0	3.0	3.0	Steller	1.5	1.5	1.5	Solid	0.0	0.0	0.0	Workable	-1.5	-1.5	-1.5	Marginal	-3.0	-3.0	-3.0	Unclear	11
Amount Of	3.0	3.0	3.0	Vast Network	1.5	1.5	1.5	Key Network	0.0	0.0	0.0	Key Players	-1.5	-1.5	-1.5	Some Players	-3.0	-3.0	-3.0	None	3
Length Of	5.0	5.0	5.0	Long Term	2.5	2.5	2.5	Comfortable	0.0	0.0	0.0	A While	-2.5	-2.5	-2.5	Relatively New	-5.0	-5.0	-5.0	Nonexistent	3
																					5
PROMISE											
Differentiation	0.0	0.0	0.0	Clear	0.0	0.0	0.0	So-So	0.0	0.0	0.0	Competition Has It	0.0	0.0	0.0	Fuzzy	0.0	0.0	0.0	Unknown	4
Value Proposition	2.0	2.0	2.0	In Tune w/ Customer Appeal	1.0	1.0	1.0	Understood	0.0	0.0	0.0	Needs Educating	-1.0	-1.0	-1.0	On Another Planet	-2.0	-2.0	-2.0	Unknown	0
Offer Appeal	1.0	1.0	1.0	Speaks to Customer	0.5	0.5	0.5	Attractive	0.0	0.0	0.0	Exists	-0.5	-0.5	-0.5	Not Important	-1.0	-1.0	-1.0	Unknown	2
Positioning	0.0	0.0	0.0	Hits Appeal & Value Prop	0.0	0.0	0.0	Hits Appeal	0.0	0.0	0.0	Hits Value Proposition	0.0	0.0	0.0	Misses the Mark Totally	0.0	0.0	0.0	Unknown	1
Messages	0.0	0.0	0.0	Believable	0.0	0.0	0.0	Acceptable	0.0	0.0	0.0	Convoluted	0.0	0.0	0.0	Unbelievable	0.0	0.0	0.0	Unknown	0
Image	0.0	0.0	0.0	Consistent/Appropriate	0.0	0.0	0.0	Consistent	0.0	0.0	0.0	Appropriate	0.0	0.0	0.0	Out of Touch	0.0	0.0	0.0	Unknown	0
Supporting Facts	1.0	1.0	1.0	Great Back Up	0.5	0.5	0.5	Reasonable	0.0	0.0	0.0	Stretching It	-0.5	-0.5	-0.5	Questionable	0.0	0.0	0.0	Unknown	0
Content Complexity	0.0	0.0	0.0	KISS	0.0	0.0	0.0	8th Grade	0.0	0.0	0.0	High School	0.0	0.0	0.0	College	-1.0	-1.0	-1.0	Smoke 'n' Mirrors	0
Content Depth	0.0	0.0	0.0	Enough to Convince	0.0	0.0	0.0	Enough to Act	0.0	0.0	0.0	Thin	0.0	0.0	0.0	Too Much	0.0	0.0	0.0	PhD	1
																				Unknown	0
																					0
DELIVERY											
Overall Contact	1.0	1.0	1.0	Take Ownership	0.5	0.5	0.5	Helpful	0.0	0.0	0.0	Approachable	-0.5	-0.5	-0.5	It's a Job	-1.0	-1.0	-1.0	Disgruntled	20
Sales Process	1.0	1.0	1.0	Enjoyable	0.5	0.5	0.5	Smooth	0.0	0.0	0.0	Okay	-0.5	-0.5	-0.5	Pressured	-1.0	-1.0	-1.0	Unknown	1
Fulfillment	3.0	3.0	3.0	Exceeds Expectations	1.5	1.5	1.5	As Promised	0.0	0.0	0.0	No Fanfare	-1.5	-1.5	-1.5	Haphazard	-3.0	-3.0	-3.0	Takes Forever	1
Use of Products/Services	9.0	9.0	9.0	Hassle-free	4.5	4.5	4.5	Reliable	0.0	0.0	0.0	So-So	-4.5	-4.5	-4.5	A Pain	-9.0	-9.0	-9.0	Unknown	3
Cust Service/Tech Support	3.0	3.0	3.0	Authority to Make Right	1.5	1.5	1.5	Superior	0.0	0.0	0.0	Responsive	-1.5	-1.5	-1.5	Accessible	-3.0	-3.0	-3.0	Couldn't Care	9
Community	3.0	3.0	3.0	Integral	1.5	1.5	1.5	Acceptable	0.0	0.0	0.0	Hit or Miss	-1.5	-1.5	-1.5	Poorly Executed	-3.0	-3.0	-3.0	Nonexistent	3
																					3
INTERACTION											
Exchange	2.0	2.0	2.0	Easy, Welcome	1.0	1.0	1.0	Encouraged	0.0	0.0	0.0	Okay	-1.0	-1.0	-1.0	Put Up With It	-2.0	-2.0	-2.0	Cut Off	15
Listening	2.0	2.0	2.0	Built In	1.0	1.0	1.0	Extra Mile	0.0	0.0	0.0	Occasional	-1.0	-1.0	-1.0	Lip Service	-2.0	-2.0	-2.0	Nonexistent	2
Follow Through	3.0	3.0	3.0	Unbelievable	1.5	1.5	1.5	Acts On Feedback	0.0	0.0	0.0	Reliable	-1.5	-1.5	-1.5	Inconsistent	-3.0	-3.0	-3.0	Forget It	2
TLC	4.0	4.0	4.0	Authentic	2.0	2.0	2.0	Flowing	0.0	0.0	0.0	Now and Then	-2.0	-2.0	-2.0	Forced	-4.0	-4.0	-4.0	What's This	3
Recognition	4.0	4.0	4.0	In Every Way	2.0	2.0	2.0	Special Treatment	0.0	0.0	0.0	Once in a While	-2.0	-2.0	-2.0	Never	-4.0	-4.0	-4.0	No Way	4
																					4
SUFFICIENT RESOURCES											
Time Spent	1.0	1.0	1.0	Enough to Leverage	0.5	0.5	0.5	Good Penetration	0.0	0.0	0.0	Adequate for 1st Round	-0.5	-0.5	-0.5	A Little Short	-1.0	-1.0	-1.0	Not Enough	6
Money Available	1.0	1.0	1.0	Plenty	0.5	0.5	0.5	Adequate	0.0	0.0	0.0	Compromised	-0.5	-0.5	-0.5	Just Barely Enough	-1.0	-1.0	-1.0	Too Little	1
Program Quality	0.0	0.0	0.0	Classic	0.0	0.0	0.0	Staying Power	0.0	0.0	0.0	Sticky	0.0	0.0	0.0	Short Termer	0.0	0.0	0.0	One Shot	1
People Expertise	2.0	2.0	2.0	Pros	1.0	1.0	1.0	Fit for Task	0.0	0.0	0.0	Average	-1.0	-1.0	-1.0	Stretching It	-2.0	-2.0	-2.0	Asking Too Much	0
Process	0.0	0.0	0.0	Closed Loop	0.0	0.0	0.0	Integrated	0.0	0.0	0.0	Some Coordination	0.0	0.0	0.0	Silos Only	0.0	0.0	0.0	Nonexistent	2
Technology	2.0	2.0	2.0	Personally Empowering	1.0	1.0	1.0	High Tech, Tech Touch	0.0	0.0	0.0	Advanced Automation	-1.0	-1.0	-1.0	Some Automation	-2.0	-2.0	-2.0	Behind	0
																					2
SYNERGY											
Campaign	0.0	0.0	0.0	Leverage	0.0	0.0	0.0	Integrated	0.0	0.0	0.0	Neutral	0.0	0.0	0.0	Helter Skelter	0.0	0.0	0.0	Opposing	4
Channel	1.0	1.0	1.0	Seamless	0.5	0.5	0.5	Complementary	0.0	0.0	0.0	Open	-0.5	-0.5	-0.5	Disarray	-1.0	-1.0	-1.0	In Conflict	0
Product/Service	2.0	2.0	2.0	Active Up Sell / Cross Sell	1.0	1.0	1.0	Customer Migration Path	0.0	0.0	0.0	Passive Up Sell / Cross Sell	-1.0	-1.0	-1.0	Unknown	-2.0	-2.0	-2.0	Disparate	1
Team	1.0	1.0	1.0	Breakthrough Results	0.5	0.5	0.5	Flawless Execution	0.0	0.0	0.0	Works Well	-0.5	-0.5	-0.5	Don't Talk	-1.0	-1.0	-1.0	Dysfunctional	2
																					1

Instructions: First Score Year 1. Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Strategic Brand Readiness (SBR) Factor Template

Strategy Status Quo Completed by XYZ Company

	YEAR				
OPPORTUNITY					
Customer Need	Riding a Wave	[X] Commodity	Create Market	Wishful	Unknown
Market Size	Large	Medium	[X] Small	Have to Make It	Unknown
Market Maturity	Growing	Emerging	[X] Stable	Shrinking	Unknown
Competition	None	Slight	[X] A Lot	[X] Fierce	Unknown
Window of Opportunity	Easy	Doable	Unknown	[X] Narrow	Too Wide
Sales Cycle	Short	Medium	[X] Long	Unknown	Too Long
Limitations/Restrictions	None	Some	[X] Many	Severe	Unknown
Access To Capital	[X] Ready	Some Work	Unknown	Hard to Get	Nonexistent
Capacity	[X] Plenty	Some	Oversupply	None	Unknown
SWING					
Customer Expectations Shift	Positive	Neutral	Negative	[X] Unclear	Unknown
Innovation	Steady Flow	[X] Proven	Leading Edge	Too Late	None
Economic Conditions	Boom	Cooking	[X] Stable	[X] Tight	Depressed
MUST HAVES					
Quality	[X] Excellent	Good	Poor	Questionable	Unknown
Value for Price	Terrific	[X] Acceptable	[X] Okay	[X] Marginal	Unknown
Commitment	[X] Serious	Somewhat	So-So	Unknown	Nonexistent
Track Record	[X] Totally Relevant	Somewhat Relevant	By Association	Related	None
Trust Worthy	Absolute	[X] Probable	Untested	Questionable	No Way
Information Flow	Readily Available	Open	[X] Upon Request	Tight	Secretive
Easy to Buy/Renew	Piece of Cake	No Problem	[X] Relatively Easy	Takes Work	Like Pulling Teeth
MOMENTUM					
Brand Equity	Sought After	Established	[X] Arrived	Toe Hold	Ignored
Market Share	Market Leader	[X] Top Ten	In the Pack	Bottom Feeder	None
Customer Share	Maxed Out	Lots of Room	[X] Tiny	Just Starting	None
# of Products/Services	Multiple, Proven	Few Proven	[X] Only One Proven	Few Unproven	Only One, Unproven
BUZZ					
Reputation	Excellent	[X] Good	Fair	Poor	Unknown
Credibility	Tons	[X] Decent	By Association	Unknown	None
Receptivity	Eager	Open	[X] Neutral	Unknown	Closed
Awareness	Considering	Knowledgeable	[X] Aware	Aided Aware	Unaware
Satisfaction	Partners	[X] Preference	[X] Loyal	[X] Likes	Unhappy
DIFFICULTY					
Opening	First to Market	What Already Believes	[X] Don't Know Much	Must Change Minds	Take On Others
Difficulty of Action	Existing to Existing	New to Existing	[X] Existing to New	New to New	Totally New Approach
Alternatives	None	Questionable	[X] A Few	[X] Unknown	[X] Tons
Switching Costs/Acquisition	No Problem	Possible	[X] Hassle	Exposure	Integral to Business
Switching Costs/Retention	Integral to Business	[X] Expensive	Hassle	Possible	No Problem
Audience Sophistication	Wants to Believe	Top Level View	Savvy	[X] Questioning Role	Unknown
Difficulty to Reach	Concentrated	Several Pockets	[X] Fragmented	Unclear	Unknown
Audience Resistance	None	Slight	Unknown	[X] Fierce	Inertia
Communication Path	Direct to User	[X] Via Internal Influencers	Unknown	Mediated by Channel	Influenced by Media

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Strategic Brand Readiness (SBR) Factor Template CONTINUED



Current Status of Factors — Five Year Strategic Plan

	YEAR		YEAR		YEAR		YEAR		YEAR	
RELATIONSHIPS										
Strengths Of		Steller	X	Solid		Workable		Marginal		Unclear
Amount Of		Vast Network		Key Network		Key Players	X	Some Players		None
Length Of		Long Term		Comfortable	X	A While		Relatively New		Nonexistent
PROMISE										
Differentiation		Clear		So-So	X	Competition Has It		Fuzzy		Unknown
Value Proposition		In Tune w/ Customer Appeal		Understood	X	Needs Educating		On Another Planet		Unknown
Offer Appeal		Speaks to Customer		Attractive	X	Exists		Not Important		Unknown
Positioning		Hits Appeal & Value Prop		Hits Appeal	X	Hits Value Proposition		Misses the Mark Totally		Unknown
Messages		Believable	X	Acceptable		Convoluted		Unbelievable		Unknown
Image		Consistent/Appropriate		Consistent	X	Appropriate		Out of Touch		Unknown
Supporting Facts		Great Back Up	X	Reasonable		Stretching It		Questionable		Smoke 'n' Mirrors
Content Complexity		KISS		8th Grade	X	High School		College		PhD
Content Depth		Enough to Convince		Enough to Act	X	Thin		Too Much		Unknown
DELIVERY										
Overall Contact		Take Ownership	X	Helpful		Approachable		It's a Job		Disgruntled
Sales Process		Enjoyable		Smooth	X	Okay		Pressured		Unknown
Fulfillment		Exceeds Expectations		As Promised	X	No Fanfare		Haphazard		Takes Forever
Use of Products/Services		Hassle-free	X	Reliable		So-So		A Pain		Unknown
Cust Service/Tech Support		Authority to Make Right	X	Superior		Responsive		Accessible		Couldn't Care
Community		Integral	X	Acceptable		Hit or Miss		Poorly Executed		Nonexistent
INTERACTION										
Exchange		Easy, Welcome		Encouraged	X	Okay		Put Up With It		Cut Off
Listening		Built In	X	Extra Mile		Occasional		Lip Service		Nonexistent
Follow Through		Unbelievable		Acts On Feedback	X	Reliable		Inconsistent		Forget It
TLC		Authentic	X	Flowing		Now and Then		Forced		What's This
Recognition		In Every Way		Special Treatment	X	Once in a While		Never		No Way
SUFFICIENT RESOURCES										
Time Spent		Enough to Leverage		Good Penetration		Adequate for 1st Round	X	A Little Short		Not Enough
Money Available		Plenty		Adequate		Compromised	X	Just Barely Enough		Too Little
Program Quality		Classic		Staying Power		Sticky	X	Short Termer		One Shot
People Expertise		Pros		Fit for Task		Average	X	Stretching It		Asking Too Much
Process		Closed Loop		Integrated	X	Some Coordination		Silos Only		Nonexistent
Technology		Personally Empowering		High Tech, Tech Touch		Advanced Automation		Some Automation	X	Behind
SYNERGY										
Campaign		Leverage		Integrated		Neutral	X	Helter Skelter		Opposing
Channel		Seamless		Complementary	X	Open		Disarray		In Conflict
Product/Service		Active Up Sell / Cross Sell		Customer Migration Path	X	Passive Up Sell / Cross Sell		Unknown		Disparate
Team		Breakthrough Results		Flawless Execution	X	Works Well		Don't Talk		Dysfunctional

Instructions: First Score Year 1. Make an additional score for Year 2 and Year 3 only if they will change from Year 1.

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Acquisition Calculator

Strategy: Status Quo

Completed by: XYZ Company

						YEAR		
OPPORTUNITY	YEAR	YEAR	YEAR	YEAR	YEAR			
Customer Need	0 0 0 Riding a Wave	1 0 0 Commodity	0 0 0 Create Market	0 0 0 Wishful	0 1 1 Unknown	5.5	4 0	4.0
Market Size	0 0 0 Large	0 0 0 Medium	1 0 0 Small	0 0 0 Have to Make It	0 1 1 Unknown	1.5	1.5	1 5
Market Maturity	0 0 0 Growing	0 0 0 Emerging	1 0 0 Stable	0 0 0 Shrinking	0 1 1 Unknown	0.0	0.0	0.0
Competition	0 0 0 None	0 0 0 Slight	1 0 0 A Lot	0 1 0 Fierce	0 0 1 Unknown	0 0	0.0	0 0
Window of Opportunity	0 0 0 Easy	0 0 0 Doable	0 0 0 Unknown	1 0 0 Narrow	0 1 1 Too Wide	0 0	-1.0	-1.0
Sales Cycle	0 0 0 Short	0 0 0 Medium	1 0 0 Long	0 0 0 Unknown	0 1 1 Too Long	-0 5	-0.5	-0 5
Limitations/Restrictions	0 0 0 None	0 0 0 Some	1 0 0 Many	0 0 0 Severe	0 1 1 Unknown	0 0	0.0	0 0
Access To Capital	1 0 0 Ready	0 0 0 Some Work	0 0 0 Unknown	0 0 0 Hard to Get	0 1 1 Nonexistent	0.0	0 0	0.0
Capacity	1 0 0 Plenty	0 0 0 Some	0 0 0 Oversupply	0 0 0 None	0 1 1 Unknown	0.0	0.0	0 0
SWING	YEAR	YEAR	YEAR	YEAR	YEAR			
Customer Expectations Shift	0 0 0 Positive	0 0 0 Neutral	0 0 0 Negative	1 0 0 Unclear	0 1 1 Unknown	0 0	0.0	0 0
Innovation	0 0 0 Steady Flow	1 0 0 Proven	0 0 0 Leading Edge	0 0 0 Too Late	0 1 1 None	-1.0	-1 0	-1.0
Economic Conditions	0 0 0 Boom	0 0 0 Cooking	1 0 0 Stable	0 1 0 Tight	0 0 1 Depressed	0 5	0 5	0.5
MUST HAVES	YEAR	YEAR	YEAR	YEAR	YEAR	0.0	-0.5	-0.5
Quality	1 0 0 Excellent	0 0 0 Good	0 0 0 Poor	0 0 0 Questionable	0 1 1 Unknown			
Value for Price	0 0 0 Terrific	1 0 0 Acceptable	0 1 0 Okay	0 0 1 Marginal	0 0 0 Unknown	2.0	2.0	2 0
Commitment	1 0 0 Serious	0 0 0 Somewhat	0 0 0 So-So	0 0 0 Unknown	0 1 1 Nonexistent	0.0	0.0	0.0
Track Record	1 0 0 Totally Relevant	0 0 0 Somewhat Relevant	0 0 0 By Association	0 0 0 Related	0 1 1 None	1.0	1.0	1.0
Trust Worthy	0 0 0 Absolute	1 0 0 Probable	0 0 0 Untested	0 0 0 Questionable	0 1 1 No Way	1.0	1 0	1.0
Information Flow	0 0 0 Readily Available	0 0 0 Open	1 0 0 Upon Request	0 0 0 Tight	0 1 1 Secretive	0 0	0.0	0.0
Easy to Buy/Renew	0 0 0 Piece of Cake	0 0 0 No Problem	1 0 0 Relatively Easy	0 0 0 Takes Work	0 1 1 Like Pulling Teeth	0 0	0.0	0 0
MOMENTUM	YEAR	YEAR	YEAR	YEAR	YEAR	0 0	0 0	0 0
Brand Equity	0 0 0 Sought After	0 0 0 Established	1 0 0 Arrived	0 0 0 Toe Hold	0 1 1 Ignored			
Market Share	0 0 0 Market Leader	1 0 0 Top Ten	0 0 0 In the Pack	0 0 0 Bottom Feeder	0 1 1 None	0.0	0.0	0.0
Customer Share	0 0 0 Maxed Out	0 0 0 Lots of Room	1 0 0 Tiny	0 0 0 Just Starting	0 1 1 None	1.5	1.5	1.5
# of Products/Services	0 0 0 Multiple, Proven	0 0 0 Few Proven	1 0 0 Only One Proven	0 0 0 Few Unproven	0 1 1 Only One, Unproven	0 0	0.0	0 0
BUZZ	YEAR	YEAR	YEAR	YEAR	YEAR	0.0	0.0	0.0
Reputation	0 0 0 Excellent	1 0 0 Good	0 0 0 Fair	0 0 0 Poor	0 1 1 Unknown			
Credibility	0 0 0 Tons	1 0 0 Decent	0 0 0 By Association	0 0 0 Unknown	0 1 1 None	2.5	2.5	2 5
Receptivity	0 0 0 Eager	0 0 0 Open	0 0 0 Neutral	0 0 0 Unknown	0 1 1 Closed	2.5	2.5	2.5
Awareness	0 0 0 Considering	0 0 0 Knowledgeable	1 0 0 Aware	0 0 0 Aided Aware	0 1 1 Unaware	0.0	0 0	0 0
Satisfaction	0 0 0 Partners	1 0 0 Preference	0 1 0 Loyal	0 0 1 Likes	0 0 0 Unhappy	0.0	0 0	0.0
DIFFICULTY	YEAR	YEAR	YEAR	YEAR	YEAR	0.0	0 0	0 0
Opening	0 0 0 First to Market	0 0 0 What Already Believes	1 0 0 Don't Know Much	0 0 0 Must Change Minds	0 1 1 Take On Others			
Difficulty of Action	0 0 0 Existing to Existing	0 0 0 New to Existing	1 0 0 Existing to New	0 0 0 New to New	0 1 1 Totally New Approach	0.0	0.0	0.0
Alternatives	0 0 0 None	0 0 0 Questionable	1 0 0 A Few	0 1 0 Unknown	0 0 1 Tons	0.0	0.0	0 0
Switching Costs/Acquisition	0 0 0 No Problem	0 0 0 Possible	1 0 0 Hassle	0 0 0 Exposure	0 1 1 Integral to Business	0.0	0.0	0.0
Switching Costs/Retention	0 0 0 Integral to Business	1 0 0 Expensive	0 0 0 Hassle	0 0 0 Possible	0 1 1 No Problem	0.0	0.0	0.0
Audience Sophistication	0 0 0 Wants to Believe	0 0 0 Top Level View	0 0 0 Savvy	1 0 0 Questioning Role	0 1 1 Unknown	0 0	0 0	0.0
Difficulty to Reach	0 0 0 Concentrated	0 0 0 Several Pockets	1 0 0 Fragmented	0 0 0 Unclear	0 1 1 Unknown	-0.5	-0 5	-0 5
Audience Resistance	0 0 0 None	0 0 0 Slight	0 0 0 Unknown	1 0 0 Fierce	0 1 1 Inertia	0.0	0.0	0.0
Communication Path	0 0 0 Direct to User	1 0 0 Via Internal Influencers	0 0 0 Unknown	0 0 0 Mediated by Channel	0 1 1 Influenced by Media	-0.5	-0.5	-0.5
						1.0	1.0	1.0

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Aquisiton Calculator --CONTINUED



Needs Gap Analysis — The Selling Process

	YEAR	YEAR	YEAR	YEAR	YEAR			
RELATIONSHIPS								
Strengths Of	0 0 0 Steller	1 0 0 Solid	0 0 0 Workable	0 0 0 Marginal	0 1 1 Unclear	0.5	0.5	0.5
Amount Of	0 0 0 Vast Network	0 0 0 Key Network	0 0 0 Key Players	1 0 0 Some Players	0 1 1 None	-0.5	-0.5	-0.5
Length Of	0 0 0 Long Term	0 0 0 Comfortable	1 0 0 A While	0 0 0 Relatvely New	0 1 1 Nonexistent	0.0	0.0	0.0
PROMISE	YEAR	YEAR	YEAR	YEAR	YEAR			
Differentiation	0 0 0 Clear	0 0 0 So-So	1 0 0 Competition Has It	0 0 0 Fuzzy	0 1 1 Unknown	0.0	0.0	0.0
Value Proposition	0 0 0 In Tune w/ Customer Appeal	0 0 0 Understood	1 0 0 Needs Educating	0 0 0 On Another Planet	0 1 1 Unknown	0.0	0.0	0.0
Offer Appeal	0 0 0 Speaks to Customer	0 0 0 Attractive	1 0 0 Exists	0 0 0 Not Important	0 1 1 Unknown	0.0	0.0	0.0
Positioning	0 0 0 Hits Appeal & Value Prop	0 0 0 Hits Appeal	1 0 0 Hits Value Proposition	0 0 0 Misses the Mark Totally	0 1 1 Unknown	0.0	0.0	0.0
Messages	0 0 0 Believable	1 0 0 Acceptable	0 0 0 Convoluted	0 0 0 Unbelievable	0 1 1 Unknown	0.5	0.5	0.5
Image	0 0 0 Consistent/Appropriate	0 0 0 Consistent	1 0 0 Appropriate	0 0 0 Out of Touch	0 1 1 Unknown	0.0	0.0	0.0
Supporting Facts	0 0 0 Great Back Up	1 0 0 Reasonable	0 0 0 Stretching It	0 0 0 Questionable	0 1 1 Smoke 'n' Mirrors	0.5	0.5	0.5
Content Complexity	0 0 0 KISS	0 0 0 8th Grade	1 0 0 High School	0 0 0 College	0 1 1 PhD	0.0	0.0	0.0
Content Depth	0 0 0 Enough to Convince	0 0 0 Enough to Act	1 0 0 Thin	0 0 0 Too Much	0 1 1 Unknown	0.0	0.0	0.0
DELIVERY	YEAR	YEAR	YEAR	YEAR	YEAR			
Overall Contact	0 0 0 Take Ownership	1 0 0 Helpful	0 0 0 Approachable	0 0 0 It's a Job	0 1 1 Disgruntled	0.5	0.5	0.5
Sales Process	0 0 0 Enjoyable	0 0 0 Smooth	1 0 0 Okay	0 0 0 Pressured	0 1 1 Unknown	0.0	0.0	0.0
Fulfillment	0 0 0 Exceeds Expectations	0 0 0 As Promised	1 0 0 No Fanfare	0 0 0 Haphazard	0 1 1 Takes Forever	0.0	0.0	0.0
Use of Products/Services	0 0 0 Hassle-free	1 0 0 Reliable	0 0 0 So-So	0 0 0 A Pain	0 1 1 Unknown	0.0	0.0	0.0
Cust Service/Tech Support	0 0 0 Authority to Make Right	1 0 0 Superior	0 0 0 Responsive	0 0 0 Accessible	0 1 1 Couldn't Care	0.0	0.0	0.0
Community	0 0 0 Integral	1 0 0 Acceptable	0 0 0 Hit or Miss	0 0 0 Poorly Executed	0 1 1 Nonexistent	0.0	0.0	0.0
INTERACTION	YEAR	YEAR	YEAR	YEAR	YEAR			
Exchange	0 0 0 Easy, Welcome	0 0 0 Encouraged	1 0 0 Okay	0 0 0 Put Up With It	0 1 1 Cut Off	0.0	0.0	0.0
Listening	0 0 0 Built In	1 0 0 Extra Mile	0 0 0 Occasional	0 0 0 Lip Service	0 1 1 Nonexistent	0.5	0.5	0.5
Follow Through	0 0 0 Unbelievable	0 0 0 Acts On Feedback	1 0 0 Reliable	0 0 0 Inconsistent	0 1 1 Forget It	0.0	0.0	0.0
TLC	0 0 0 Authentic	1 0 0 Flowing	0 0 0 Now and Then	0 0 0 Forced	0 1 1 What's This	0.0	0.0	0.0
Recognition	0 0 0 In Every Way	0 0 0 Special Treatment	1 0 0 Once in a While	0 0 0 Never	0 1 1 No Way	0.0	0.0	0.0
SUFFICIENT RESOURCES	YEAR	YEAR	YEAR	YEAR	YEAR			
Time Spent	0 0 0 Enough to Leverage	0 0 0 Good Penetration	0 0 0 Adequate for 1st Round	1 0 0 A Little Short	0 1 1 Not Enough	-1.0	-1.0	-1.0
Money Available	0 0 0 Plenty	0 0 0 Adequate	0 0 0 Compromised	1 0 0 Just Barely Enough	0 1 1 Too Little	-0.5	-0.5	-0.5
Program Quality	0 0 0 Classic	0 0 0 Staying Power	0 0 0 Sticky	1 0 0 Short Termer	0 1 1 One Shot	-0.5	-0.5	-0.5
People Expertise	0 0 0 Pros	0 0 0 Fit for Task	0 0 0 Average	1 0 0 Stretching It	0 1 1 Asking Too Much	-1.0	-1.0	-1.0
Process	0 0 0 Closed Loop	0 0 0 Integrated	1 0 0 Some Coordination	0 0 0 Silos Only	0 1 1 Nonexistent	0.0	0.0	0.0
Technology	0 0 0 Personally Empowering	0 0 0 High Tech, Tech Touch	0 0 0 Advanced Automation	0 0 0 Some Automation	1 1 1 Behind	-2.0	-2.0	-2.0
SYNERGY	YEAR	YEAR	YEAR	YEAR	YEAR			
Campaign	0 0 0 Leverage	0 0 0 Integrated	0 0 0 Neutral	1 0 0 Helter Skelter	0 1 1 Opposing	-2.5	-2.5	-2.5
Channel	0 0 0 Seamless	0 0 0 Complementary	1 0 0 Open	0 0 0 Disarray	0 1 1 In Conflict	0.0	0.0	0.0
Product/Service	0 0 0 Active Up Sell / Cross Sell	0 0 0 Customer Migration Path	1 0 0 Passive Up Sell / Cross Sell	0 0 0 Unknown	0 1 1 Disparate	0.0	0.0	0.0
Team	0 0 0 Breakthrough Results	0 0 0 Flawless Execution	1 0 0 Works Well	0 0 0 Don't Talk	0 1 1 Dysfunctional	0.0	0.0	0.0

Instructions: First Score Year 1. Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Closing Calculator

Strategy: Status Quo

Completed by: XYZ Company

	YEAR	YEAR	YEAR	YEAR	YEAR	YEAR		
OPPORTUNITY								
Customer Need	0 0 0 Riding a Wave	1 0 0 Commodity	0 0 0 Create Market	0 0 0 Wishful	0 1 1 Unknown	11.5	6 5	4.0
Market Size	0 0 0 Large	0 0 0 Medium	1 0 0 Small	0 0 0 Have to Make It	0 1 1 Unknown	1.0	1.0	1.0
Market Maturity	0 0 0 Growing	0 0 0 Emerging	1 0 0 Stable	0 0 0 Shrinking	0 1 1 Unknown	0.0	0 0	0.0
Competition	0 0 0 None	0 0 0 Slight	1 0 0 A Lot	0 1 0 Fierce	0 0 1 Unknown	0.0	0 0	0 0
Window of Opportunity	0 0 0 Easy	0 0 0 Doable	0 0 0 Unknown	1 0 0 Narrow	0 1 1 Too Wide	0.0	-1.0	-1.0
Sales Cycle	0 0 0 Short	0 0 0 Medium	1 0 0 Long	0 0 0 Unknown	0 1 1 Too Long	0.0	0.0	0.0
Limitations/Restrictions	0 0 0 None	0 0 0 Some	1 0 0 Many	0 0 0 Severe	0 1 1 Unknown	0.0	0.0	0.0
Access To Capital	1 0 0 Ready	0 0 0 Some Work	0 0 0 Unknown	0 0 0 Hard to Get	0 1 1 Nonexistent	0.0	0.0	0 0
Capacity	1 0 0 Plenty	0 0 0 Some	0 0 0 Oversupply	0 0 0 None	0 1 1 Unknown	0.0	0.0	0.0
SWING								
Customer Expectations Shift	0 0 0 Positive	0 0 0 Neutral	0 0 0 Negative	1 0 0 Unclear	0 1 1 Unknown	-0.5	-0.5	-0.5
Innovation	0 0 0 Steady Flow	1 0 0 Proven	0 0 0 Leading Edge	0 0 0 Too Late	0 1 1 None	0.5	0.5	0 5
Economic Conditions	0 0 0 Boom	0 0 0 Cooking	1 0 0 Stable	0 1 0 Tight	0 0 1 Depressed	0.0	-1.5	-1.5
MUST HAVES								
Quality	1 0 0 Excellent	0 0 0 Good	0 0 0 Poor	0 0 0 Questionable	0 1 1 Unknown	3.0	3.0	3 0
Value for Price	0 0 0 Terrific	1 0 0 Acceptable	0 1 0 Okay	0 0 1 Marginal	0 0 0 Unknown	1.5	0.0	-1.5
Commitment	1 0 0 Serious	0 0 0 Somewhat	0 0 0 So-So	0 0 0 Unknown	0 1 1 Nonexistent	1.0	1.0	1.0
Track Record	1 0 0 Totally Relevant	0 0 0 Somewhat Relevant	0 0 0 By Association	0 0 0 Related	0 1 1 None	1.0	1.0	1.0
Trust Worthy	0 0 0 Absolute	1 0 0 Probable	0 0 0 Untested	0 0 0 Questionable	0 1 1 No Way	0.5	0.5	0.5
Information Flow	0 0 0 Readily Available	0 0 0 Open	1 0 0 Upon Request	0 0 0 Tight	0 1 1 Secretive	0.0	0.0	0.0
Easy to Buy/Renew	0 0 0 Piece of Cake	0 0 0 No Problem	1 0 0 Relatively Easy	0 0 0 Takes Work	0 1 1 Like Pulling Teeth	0.0	0.0	0.0
MOMENTUM								
Brand Equity	0 0 0 Sought After	0 0 0 Established	1 0 0 Arrived	0 0 0 Toe Hold	0 1 1 Ignored	0.0	0.0	0.0
Market Share	0 0 0 Market Leader	1 0 0 Top Ten	0 0 0 In the Pack	0 0 0 Bottom Feeder	0 1 1 None	1.0	1.0	1 0
Customer Share	0 0 0 Maxed Out	0 0 0 Lots of Room	1 0 0 Tiny	0 0 0 Just Starting	0 1 1 None	0.0	0.0	0.0
# of Products/Services	0 0 0 Multiple, Proven	0 0 0 Few Proven	1 0 0 Only One Proven	0 0 0 Few Unproven	0 1 1 Only One, Unproven	0.0	0 0	0.0
BUZZ								
Reputation	0 0 0 Excellent	1 0 0 Good	0 0 0 Fair	0 0 0 Poor	0 1 1 Unknown	2.0	2.0	2.0
Credibility	0 0 0 Tons	1 0 0 Decent	0 0 0 By Association	0 0 0 Unknown	0 1 1 None	2.0	2.0	2.0
Receptivity	0 0 0 Eager	0 0 0 Open	1 0 0 Neutral	0 0 0 Unknown	0 1 1 Closed	0 0	0.0	0.0
Awareness	0 0 0 Considering	0 0 0 Knowledgeable	1 0 0 Aware	0 0 0 Aided Aware	0 1 1 Unaware	0.0	0.0	0.0
Satisfaction	0 0 0 Partners	1 0 0 Preference	0 1 0 Loyal	0 0 1 Likes	0 0 0 Unhappy	0.0	0.0	0.0
DIFFICULTY								
Opening	0 0 0 First to Market	0 0 0 What Already Believes	1 0 0 Don't Know Much	0 0 0 Must Change Minds	0 1 1 Take On Others	0.0	0 0	0 0
Difficulty of Action	0 0 0 Existing to Existing	0 0 0 New to Existing	1 0 0 Existing to New	0 1 0 New to New	0 1 1 Totally New Approach	0.0	0 0	0.0
Alternatives	0 0 0 None	0 0 0 Questionable	1 0 0 A Few	0 1 0 Unknown	0 0 1 Tons	0 0	-1.0	-2 0
Switching Costs/Acquisition	0 0 0 No Problem	0 0 0 Possible	1 0 0 Hassle	0 0 0 Exposure	0 1 1 Integral to Business	0.0	0.0	0.0
Switching Costs/Retention	0 0 0 Integral to Business	1 0 0 Expensive	0 0 0 Hassle	0 0 0 Possible	0 1 1 No Problem	0.0	0.0	0.0
Audience Sophistication	0 0 0 Wants to Believe	0 0 0 Top Level View	0 0 0 Savvy	1 0 0 Questioning Role	0 1 1 Unknown	-0.5	-0.5	-0 5
Difficulty to Reach	0 0 0 Concentrated	0 0 0 Several Pockets	1 0 0 Fragmented	0 0 0 Unclear	0 1 1 Unknown	0.0	0.0	0.0
Audience Resistance	0 0 0 None	0 0 0 Slight	0 0 0 Unknown	1 0 0 Fierce	0 1 1 Inertia	-1.0	-1.0	-1.0
Communication Path	0 0 0 Direct to User	1 0 0 Via Internal Influencers	0 0 0 Unknown	0 0 0 Mediated by Channel	0 1 1 Influenced by Media	0.5	0.5	0 5

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Closing Calculator -- CONTINUED

	YEAR	YEAR	YEAR	YEAR	YEAR			
RELATIONSHIPS								
Strengths Of	0 0 0 Stellar	1 0 0 Solid	0 0 0 Workable	0 0 0 Marginal	0 1 1 Unclear	1.0	1.0	1.0
Amount Of	0 0 0 Vast Network	0 0 0 Key Network	0 0 0 Key Players	1 0 0 Some Players	0 1 1 None	-1.5	-1.5	-1.5
Length Of	0 0 0 Long Term	0 0 0 Comfortable	1 0 0 A While	0 0 0 Relatively New	0 1 1 Nonexistent	0.0	0.0	0.0
PROMISE	YEAR	YEAR	YEAR	YEAR	YEAR			
Differentiation	0 0 0 Clear	0 0 0 So-So	1 0 0 Competition Has It	0 0 0 Fuzzy	0 1 1 Unknown	0.0	0.0	0.0
Value Proposition	0 0 0 In Tune w/ Customer Appeal	0 0 0 Understood	1 0 0 Needs Educating	0 0 0 On Another Planet	0 1 1 Unknown	0.0	0.0	0.0
Offer Appeal	0 0 0 Speaks to Customer	0 0 0 Attractive	1 0 0 Exists	0 0 0 Not Important	0 1 1 Unknown	0.0	0.0	0.0
Positioning	0 0 0 Hits Appeal & Value Prop	0 0 0 Hits Appeal	1 0 0 Hits Value Proposition	0 0 0 Misses the Mark Totally	0 1 1 Unknown	0.0	0.0	0.0
Messages	0 0 0 Believable	1 0 0 Acceptable	0 0 0 Convoluted	0 0 0 Unbelievable	0 1 1 Unknown	0.0	0.0	0.0
Image	0 0 0 Consistent/Appropriate	0 0 0 Consistent	1 0 0 Appropriate	0 0 0 Out of Touch	0 1 1 Unknown	0.0	0.0	0.0
Supporting Facts	0 0 0 Great Back Up	1 0 0 Reasonable	0 0 0 Stretching It	0 0 0 Questionable	0 1 1 Smoke 'n' Mirrors	1.0	1.0	1.0
Content Complexity	0 0 0 KISS	0 0 0 8th Grade	1 0 0 High School	0 0 0 College	0 1 1 PhD	0.0	0.0	0.0
Content Depth	0 0 0 Enough to Convince	0 0 0 Enough to Act	1 0 0 Thin	0 0 0 Too Much	0 1 1 Unknown	0.0	0.0	0.0
DELIVERY	YEAR	YEAR	YEAR	YEAR	YEAR			
Overall Contact	0 0 0 Take Ownership	1 0 0 Helpful	0 0 0 Approachable	0 0 0 It's a Job	0 1 1 Disgruntled	1.0	1.0	1.0
Sales Process	0 0 0 Enjoyable	0 0 0 Smooth	1 0 0 Okay	0 0 0 Pressured	0 1 1 Unknown	0.0	0.0	0.0
Fulfillment	0 0 0 Exceeds Expectations	0 0 0 As Promised	1 0 0 No Fanfare	0 0 0 Haphazard	0 1 1 Takes Forever	0.0	0.0	0.0
Use of Products/Services	0 0 0 Hassle-free	1 0 0 Reliable	0 0 0 So-So	0 0 0 A Pain	0 1 1 Unknown	0.0	0.0	0.0
Cust Service/Tech Support	0 0 0 Authority to Make Right	1 0 0 Superior	0 0 0 Responsive	0 0 0 Accessible	0 1 1 Couldn't Care	0.0	0.0	0.0
Community	0 0 0 Integral	1 0 0 Acceptable	0 0 0 Hit or Miss	0 0 0 Poorly Executed	0 1 1 Nonexistent	0.0	0.0	0.0
INTERACTION	YEAR	YEAR	YEAR	YEAR	YEAR			
Exchange	0 0 0 Easy, Welcome	0 0 0 Encouraged	1 0 0 Okay	0 0 0 Put Up With It	0 1 1 Cut Off	0.0	0.0	0.0
Listening	0 0 0 Built In	1 0 0 Extra Mile	0 0 0 Occasional	0 0 0 Lip Service	0 1 1 Nonexistent	1.0	1.0	1.0
Follow Through	0 0 0 Unbelievable	0 0 0 Acts On Feedback	1 0 0 Reliable	0 0 0 Inconsistent	0 1 1 Forget It	0.0	0.0	0.0
TLC	0 0 0 Authentic	1 0 0 Flowing	0 0 0 Now and Then	0 0 0 Forced	0 1 1 What's This	0.0	0.0	0.0
Recognition	0 0 0 In Every Way	0 0 0 Special Treatment	1 0 0 Once In a While	0 0 0 Never	0 1 1 No Way	0.0	0.0	0.0
SUFFICIENT RESOURCES	YEAR	YEAR	YEAR	YEAR	YEAR			
Time Spent	0 0 0 Enough to Leverage	0 0 0 Good Penetration	0 0 0 Adequate for 1st Round	1 0 0 A Little Short	0 1 1 Not Enough	-1.0	-1.0	-1.0
Money Available	0 0 0 Plenty	0 0 0 Adequate	0 0 0 Compromised	1 0 0 Just Barely Enough	0 1 1 Too Little	-0.5	-0.5	-0.5
Program Quality	0 0 0 Classic	0 0 0 Staying Power	0 0 0 Sticky	1 0 0 Short Termer	0 1 1 One Shot	0.0	0.0	0.0
People Expertise	0 0 0 Pros	0 0 0 Fit for Task	0 0 0 Average	1 0 0 Stretching It	0 1 1 Asking Too Much	-1.0	-1.0	-1.0
Process	0 0 0 Closed Loop	0 0 0 Integrated	1 0 0 Some Coordination	0 0 0 Silos Only	0 1 1 Nonexistent	0.0	0.0	0.0
Technology	0 0 0 Personally Empowering	0 0 0 High Tech, Tech Touch	0 0 0 Advanced Automation	0 0 0 Some Automation	1 1 1 Behind	0.0	0.0	0.0
SYNERGY	YEAR	YEAR	YEAR	YEAR	YEAR			
Campaign	0 0 0 Leverage	0 0 0 Integrated	0 0 0 Neutral	1 0 0 Helter Skelter	0 1 1 Opposing	-0.5	-0.5	-0.5
Channel	0 0 0 Seamless	0 0 0 Complementary	1 0 0 Open	0 0 0 Disarray	0 1 1 In Conflict	0.0	0.0	0.0
Product/Service	0 0 0 Active Up Sell / Cross Sell	0 0 0 Customer Migration Path	1 0 0 Passive Up Sell / Cross Sell	0 0 0 Unknown	0 1 1 Disparate	0.0	0.0	0.0
Team	0 0 0 Breakthrough Results	0 0 0 Flawless Execution	1 0 0 Works Well	0 0 0 Don't Talk	0 1 1 Dysfunctional	0.0	0.0	0.0

Instructions: First Score Year 1. Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Retention Calculator

Strategy: Status Quo

Completed by: XYZ Company

	YEAR										YEAR		
OPPORTUNITY													
Customer Need	0	0	0	Riding a Wave	1	0	0	Commodity	0	0	0	Create Market	0	0	0	Wishful	0	1	1	Unknown	20.0	13.0	7.5
Market Size	0	0	0	Large	0	0	0	Medium	1	0	0	Small	0	0	0	Have to Make It	0	1	1	Unknown	0.0	0.0	0.0
Market Maturity	0	0	0	Growing	0	0	0	Emerging	1	0	0	Stable	0	0	0	Shrinking	0	1	1	Unknown	0.0	0.0	0.0
Competition	0	0	0	None	0	0	0	Slight	1	0	0	A Lot	0	1	0	Fierce	0	0	1	Unknown	0.0	0.0	0.0
Window of Opportunity	0	0	0	Easy	0	0	0	Doable	0	0	0	Unknown	1	0	0	Narrow	0	1	1	Too Wide	0.0	0.0	0.0
Sales Cycle	0	0	0	Short	0	0	0	Medium	1	0	0	Long	0	0	0	Unknown	0	1	1	Too Long	0.0	0.0	0.0
Limitations/Restrictions	0	0	0	None	0	0	0	Some	1	0	0	Many	0	0	0	Severe	0	1	1	Unknown	0.0	0.0	0.0
Access To Capital	1	0	0	Ready	0	0	0	Some Work	0	0	0	Unknown	0	0	0	Hard to Get	0	1	1	Nonexistent	1.0	1.0	1.0
Capacity	1	0	0	Plenty	0	0	0	Some	0	0	0	Oversupply	0	0	0	None	0	1	1	Unknown	1.0	1.0	1.0
SWING	YEAR				YEAR				YEAR				YEAR				YEAR						
Customer Expectations Shift	0	0	0	Positive	0	0	0	Neutral	0	0	0	Negative	1	0	0	Unclear	0	1	1	Unknown	-1.5	-1.5	-1.5
Innovation	0	0	0	Steady Flow	1	0	0	Proven	0	0	0	Leading Edge	0	0	0	Too Late	0	1	1	None	0.5	0.5	0.5
Economic Conditions	0	0	0	Boom	0	0	0	Cooking	1	0	0	Stable	0	1	0	Tight	0	0	1	Depressed	0.0	-0.5	-0.5
MUST HAVES	YEAR				YEAR				YEAR				YEAR				YEAR						
Quality	1	0	0	Excellent	0	0	0	Good	0	0	0	Poor	0	0	0	Questionable	0	1	1	Unknown	2.0	2.0	2.0
Value for Price	0	0	0	Terrific	1	0	0	Acceptable	0	1	0	Okay	0	0	1	Marginal	0	0	0	Unknown	2.0	0.0	-2.0
Commitment	1	0	0	Serious	0	0	0	Somewhat	0	0	0	So-So	0	0	0	Unknown	0	1	1	Nonexistent	0.0	0.0	0.0
Track Record	1	0	0	Totally Relevant	0	0	0	Somewhat Relevant	0	0	0	By Association	0	0	0	Related	0	1	1	None	0.0	0.0	0.0
Trust Worthy	0	0	0	Absolute	1	0	0	Probable	0	0	0	Untested	0	0	0	Questionable	0	1	1	No Way	1.0	1.0	1.0
Information Flow	0	0	0	Readily Available	0	0	0	Open	1	0	0	Upon Request	0	0	0	Tight	0	1	1	Secretive	0.0	0.0	0.0
Easy to Buy/Renew	0	0	0	Piece of Cake	0	0	0	No Problem	1	0	0	Relatively Easy	0	0	0	Takes Work	0	1	1	Like Pulling Teeth	0.0	0.0	0.0
MOMENTUM	YEAR				YEAR				YEAR				YEAR				YEAR						
Brand Equity	0	0	0	Sought After	0	0	0	Established	1	0	0	Arrived	0	0	0	Toe Hold	0	1	1	Ignored	0.0	0.0	0.0
Market Share	0	0	0	Market Leader	1	0	0	Top Ten	0	0	0	In the Pack	0	0	0	Bottom Feeder	0	1	1	None	0.5	0.5	0.5
Customer Share	0	0	0	Maxed Out	0	0	0	Lots of Room	1	0	0	Tiny	0	0	0	Just Starting	0	1	1	None	0.0	0.0	0.0
# of Products/Services	0	0	0	Multiple, Proven	0	0	0	Few Proven	1	0	0	Only One Proven	0	0	0	Few Unproven	0	1	1	Only One, Unproven	0.0	0.0	0.0
BUZZ	YEAR				YEAR				YEAR				YEAR				YEAR						
Reputation	0	0	0	Excellent	1	0	0	Good	0	0	0	Fair	0	0	0	Poor	0	1	1	Unknown	0.0	0.0	0.0
Credibility	0	0	0	Tons	1	0	0	Decent	0	0	0	By Association	0	0	0	Unknown	0	1	1	None	0.5	0.5	0.5
Receptivity	0	0	0	Eager	0	0	0	Open	1	0	0	Neutral	0	0	0	Unknown	0	1	1	Closed	0.0	0.0	0.0
Awareness	0	0	0	Considering	0	0	0	Knowledgeable	1	0	0	Aware	0	0	0	Aided Aware	0	1	1	Unaware	0.0	0.0	0.0
Satisfaction	0	0	0	Partners	1	0	0	Preference	0	1	0	Loyal	0	0	1	Likes	0	0	0	Unhappy	2.0	0.0	-2.0
DIFFICULTY	YEAR				YEAR				YEAR				YEAR				YEAR						
Opening	0	0	0	First to Market	0	0	0	What Already Believes	1	0	0	Don't Know Much	0	0	0	Must Change Minds	0	1	1	Take On Others	0.0	0.0	0.0
Difficulty of Action	0	0	0	Existing to Existing	0	0	0	New to Existing	1	0	0	Existing to New	0	0	0	New to New	0	1	1	Totally New Approach	0.0	0.0	0.0
Alternatives	0	0	0	None	0	0	0	Questionable	1	0	0	A Few	0	1	0	Unknown	0	0	1	Tons	0.0	-1.5	-3.0
Switching Costs/Acquisition	0	0	0	No Problem	0	0	0	Possible	1	0	0	Hassle	0	0	0	Exposure	0	1	1	Integral to Business	0.0	0.0	0.0
Switching Costs/Retention	0	0	0	Integral to Business	1	0	0	Expensive	1	0	0	Hassle	0	0	0	Possible	0	1	1	No Problem	3.5	3.5	3.5
Audience Sophistication	0	0	0	Wants to Believe	0	0	0	Top Level View	0	0	0	Savvy	1	0	0	Questioning Role	0	1	1	Unknown	0.0	0.0	0.0
Difficulty to Reach	0	0	0	Concentrated	0	0	0	Several Pockets	1	0	0	Fragmented	0	0	0	Unclear	0	1	1	Unknown	0.0	0.0	0.0
Audience Resistance	0	0	0	None	0	0	0	Slight	0	0	0	Unknown	1	0	0	Fierce	0	1	1	Inertia	0.0	0.0	0.0
Communication Path	0	0	0	Direct to User	1	0	0	Via Internal Influencers	0	0	0	Unknown	0	0	0	Mediated by Channel	0	1	1	Influenced by Media	0.0	0.0	0.0

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Retention Calculator -- CONTINUED

	YEAR		YEAR		YEAR		YEAR		YEAR			
RELATIONSHIPS												
Strengths Of	0 0 0	Steller	1 0 0	Solid	0 0 0	Workable	0 0 0	Marginal	0 1 1	Unclear	1.5	1.5	1.5
Amount Of	0 0 0	Vast Network	0 0 0	Key Network	0 0 0	Key Players	1 0 0	Some Players	0 1 1	None	-1.5	-1.5	-1.5
Length Of	0 0 0	Long Term	0 0 0	Comfortable	1 0 0	A While	0 0 0	Relatively New	0 1 1	Nonexistent	0.0	0.0	0.0
PROMISE												
Differentiation	0 0 0	Clear	0 0 0	So-So	1 0 0	Competition Has It	0 0 0	Fuzzy	0 1 1	Unknown	0.0	0.0	0.0
Value Proposition	0 0 0	In Tune w/ Customer Appeal	0 0 0	Understood	1 0 0	Needs Educating	0 0 0	On Another Planet	0 1 1	Unknown	0.0	0.0	0.0
Offer Appeal	0 0 0	Speaks to Customer	0 0 0	Attractive	1 0 0	Exists	0 0 0	Not Important	0 1 1	Unknown	0.0	0.0	0.0
Positioning	0 0 0	Hits Appeal & Value Prop	0 0 0	Hits Appeal	1 0 0	Hits Value Proposition	0 0 0	Misses the Mark Totally	0 1 1	Unknown	0.0	0.0	0.0
Messages	0 0 0	Believable	1 0 0	Acceptable	0 0 0	Convoluted	0 0 0	Unbelievable	0 1 1	Unknown	0.0	0.0	0.0
Image	0 0 0	Consistent/Appropriate	0 0 0	Consistent	1 0 0	Appropriate	0 0 0	Out of Touch	0 1 1	Unknown	0.0	0.0	0.0
Supporting Facts	0 0 0	Great Back Up	1 0 0	Reasonable	0 0 0	Stretching It	0 0 0	Questionable	0 1 1	Smoke 'n' Mirrors	0.5	0.5	0.5
Content Complexity	0 0 0	KISS	0 0 0	8th Grade	1 0 0	High School	0 0 0	College	0 1 1	PhD	0.0	0.0	0.0
Content Depth	0 0 0	Enough to Convince	0 0 0	Enough to Act	1 0 0	Thin	0 0 0	Too Much	0 1 1	Unknown	0.0	0.0	0.0
DELIVERY												
Overall Contact	0 0 0	Take Ownership	1 0 0	Helpful	0 0 0	Approachable	0 0 0	It's a Job	0 1 1	Disgruntled	0.5	0.5	0.5
Sales Process	0 0 0	Enjoyable	0 0 0	Smooth	1 0 0	Okay	0 0 0	Pressured	0 1 1	Unknown	0.0	0.0	0.0
Fulfillment	0 0 0	Exceeds Expectations	0 0 0	As Promised	1 0 0	No Fanfare	0 0 0	Haphazard	0 1 1	Takes Forever	0.0	0.0	0.0
Use of Products/Services	0 0 0	Hassle-free	1 0 0	Reliable	0 0 0	So-So	0 0 0	A Pain	0 1 1	Unknown	4.5	4.5	4.5
Cust Service/Tech Support	0 0 0	Authority to Make Right	1 0 0	Superior	0 0 0	Responsive	0 0 0	Accessible	0 1 1	Couldn't Care	1.5	1.5	1.5
Community	0 0 0	Integral	1 0 0	Acceptable	0 0 0	Hit or Miss	0 0 0	Poorly Executed	0 1 1	Nonexistent	1.5	1.5	1.5
INTERACTION												
Exchange	0 0 0	Easy, Welcome	0 0 0	Encouraged	1 0 0	Okay	0 0 0	Put Up With It	0 1 1	Cut Off	0.0	0.0	0.0
Listening	0 0 0	Built In	1 0 0	Extra Mile	0 0 0	Occasional	0 0 0	Lip Service	0 1 1	Nonexistent	1.0	1.0	1.0
Follow Through	0 0 0	Unbelievable	0 0 0	Acts On Feedback	1 0 0	Reliable	0 0 0	Inconsistent	0 1 1	Forget It	0.0	0.0	0.0
TLC	0 0 0	Authentic	1 0 0	Flowing	0 0 0	Now and Then	0 0 0	Forced	0 1 1	What's This	2.0	2.0	2.0
Recognition	0 0 0	In Every Way	0 0 0	Special Treatment	1 0 0	Once in a While	0 0 0	Never	0 1 1	No Way	0.0	0.0	0.0
SUFFICIENT RESOURCES												
Time Spent	0 0 0	Enough to Leverage	0 0 0	Good Penetration	0 0 0	Adequate for 1st Round	1 0 0	A Little Short	0 1 1	Not Enough	-0.5	-0.5	-0.5
Money Available	0 0 0	Plenty	0 0 0	Adequate	0 0 0	Compromised	1 0 0	Just Barely Enough	0 1 1	Too Little	-0.5	-0.5	-0.5
Program Quality	0 0 0	Classic	0 0 0	Staying Power	0 0 0	Sticky	1 0 0	Short Termer	0 1 1	One Shot	0.0	0.0	0.0
People Expertise	0 0 0	Pros	0 0 0	Fit for Task	0 0 0	Average	1 0 0	Stretching It	0 1 1	Asking Too Much	-1.0	-1.0	-1.0
Process	0 0 0	Closed Loop	0 0 0	Integrated	1 0 0	Some Coordination	0 0 0	Silos Only	0 1 1	Nonexistent	0.0	0.0	0.0
Technology	0 0 0	Personally Empowering	0 0 0	High Tech, Tech Touch	0 0 0	Advanced Automation	0 0 0	Some Automation	1 1 1	Behind	-2.0	-2.0	-2.0
SYNERGY												
Campaign	0 0 0	Leverage	0 0 0	Integrated	0 0 0	Neutral	1 0 0	Helter Skelter	0 1 1	Opposing	0.0	0.0	0.0
Channel	0 0 0	Seamless	0 0 0	Complementary	1 0 0	Open	0 0 0	Disarray	0 1 1	In Conflict	0.0	0.0	0.0
Product/Service	0 0 0	Active Up Sell / Cross Sell	0 0 0	Customer Migration Path	1 0 0	Passive Up Sell / Cross Sell	0 0 0	Unknown	0 1 1	Disparate	0.0	0.0	0.0
Team	0 0 0	Breakthrough Results	0 0 0	Flawless Execution	1 0 0	Works Well	0 0 0	Don't Talk	0 1 1	Dysfunctional	0.0	0.0	0.0

Instructions: First Score Year 1. Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Strategic Brand Readiness (SBR) Report by Strategy

Client: XYZ Company
Strategy: Status Quo

Phase Allocation	Max %	Year 1	Year 2	Year 3
Acquisition	+/- 2	0.1%	0.1%	0.1%
Closing	+/- 3	0.3%	0.2%	0.1%
Retention	+/- 5	1.0%	0.7%	0.4%
SBR FACTOR	+/- 10	**1.4%**	**1.0%**	**0.6%**

Strategic Brand Readiness (SBR) Factor Template

Strategy Planned Completed by XYZ Company

	YEAR				
OPPORTUNITY					
Customer Need	Riding a Wave	x Commodity	Create Market	Wishful	Unknown
Market Size	Large	Medium	x Small	Have to Make It	Unknown
Market Maturity	Growing	Emerging	x Stable	Shrinking	Unknown
Competition	None	Slight	x A Lot	x Fierce	Unknown
Window of Opportunity	Easy	Doable	Unknown	x Narrow	Too Wide
Sales Cycle	Short	Medium	x Long	Unknown	Too Long
Limitations/Restrictions	None	Some	x Many	Severe	Unknown
Access To Capital	x Ready	Some Work	Unknown	Hard to Get	Nonexistent
Capacity	x Plenty	Some	Oversupply	None	Unknown
SWING					
Customer Expectations Shift	Positive	Neutral	Negative	x Unclear	Unknown
Innovation	Steady Flow	x Proven	Leading Edge	Too Late	None
Economic Conditions	Boom	Cooking	x Stable	x Tight	Depressed
MUST HAVES					
Quality	x Excellent	Good	Poor	Questionable	Unknown
Value for Price	Terrific	x Acceptable	x Okay	x Marginal	Unknown
Commitment	x Serious	Somewhat	So-So	Unknown	Nonexistent
Track Record	x Totally Relevant	Somewhat Relevant	By Association	Related	None
Trust Worthy	Absolute	x Probable	Untested	Questionable	No Way
Information Flow	Readily Available	Open	x Upon Request	Tight	Secretive
Easy to Buy/Renew	Piece of Cake	No Problem	x Relatively Easy	Takes Work	Like Pulling Teeth
MOMENTUM					
Brand Equity	Sought After	Established	x Arrived	Toe Hold	Ignored
Market Share	Market Leader	x Top Ten	In the Pack	Bottom Feeder	None
Customer Share	Maxed Out	Lots of Room	x Tiny	Just Starting	None
# of Products/Services	Multiple, Proven	Few Proven	x Only One Proven	Few Unproven	Only One, Unproven
BUZZ					
Reputation	Excellent	x Good	Fair	Poor	Unknown
Credibility	Tons	x Decent	By Association	Unknown	None
Receptivity	Eager	Open	x Neutral	Unknown	Closed
Awareness	Considering	Knowledgeable	x Aware	Aided Aware	Unaware
Satisfaction	Partners	x Preference	x Loyal	x Likes	Unhappy
DIFFICULTY					
Opening	First to Market	What Already Believes	x Don't Know Much	Must Change Minds	Take On Others
Difficulty of Action	Existing to Existing	New to Existing	x Existing to New	New to New	Totally New Approach
Alternatives	None	Questionable	x A Few	x Unknown	x Tons
Switching Costs/Acquisition	No Problem	Possible	x Hassle	Exposure	Integral to Business
Switching Costs/Retention	Integral to Business	x Expensive	Hassle	Possible	No Problem
Audience Sophistication	Wants to Believe	Top Level View	Savvy	x Questioning Role	Unknown
Difficulty to Reach	Concentrated	Several Pockets	x Fragmented	Unclear	Unknown
Audience Resistance	None	Slight	Unknown	x Fierce	Inertia
Communication Path	Direct to User	x Via Internal Influencers	Unknown	Mediated by Channel	Influenced by Media

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Strategic Brand Readiness (SBR) Factor Template CONTINUED



	YEAR			YEAR			YEAR			YEAR			YEAR		
RELATIONSHIPS															
Strengths Of		X	Steller	X		Solid			Workable			Marginal			Unclear
Amount Of			Vast Network	X		Key Network		X	Key Players	X		Some Players			None
Length Of			Long Term	X		Comfortable	X		A While			Relatively New			Nonexistent
PROMISE	YEAR			YEAR			YEAR			YEAR			YEAR		
Differentiation			Clear			So-So	X		Competition Has It			Fuzzy			Unknown
Value Proposition			In Tune w/ Customer Appeal			Understood	X		Needs Educating			On Another Planet			Unknown
Offer Appeal			Speaks to Customer			Attractive	X		Exists			Not Important			Unknown
Positioning			Hits Appeal & Value Prop			Hits Appeal	X		Hits Value Proposition			Misses the Mark Totally			Unknown
Messages			Believable	X		Acceptable			Convoluted			Unbelievable			Unknown
Image		X	Consistent/Appropriate			Consistent	X		Appropriate			Out of Touch			Unknown
Supporting Facts			Great Back Up	X		Reasonable			Stretching It			Questionable			Smoke 'n' Mirrors
Content Complexity			KISS			8th Grade	X		High School			College			PhD
Content Depth			Enough to Convince			Enough to Act	X		Thin			Too Much			Unknown
DELIVERY	YEAR			YEAR			YEAR			YEAR			YEAR		
Overall Contact			Take Ownership	X		Helpful			Approachable			It's a Job			Disgruntled
Sales Process			Enjoyable		X	Smooth	X		Okay			Pressured			Unknown
Fulfillment			Exceeds Expectations		X	As Promised	X		No Fanfare			Haphazard			Takes Forever
Use of Products/Services			Hassle-free	X		Reliable			So-So			A Pain			Unknown
Cust Service/Tech Support			Authority to Make Right	X		Superior			Responsive			Accessible			Couldn't Care
Community			Integral	X		Acceptable			Hit or Miss			Poorly Executed			Nonexistent
INTERACTION	YEAR			YEAR			YEAR			YEAR			YEAR		
Exchange			Easy, Welcome		X	Encouraged	X		Okay			Put Up With It			Cut Off
Listening			Built In	X		Extra Mile			Occasional			Lip Service			Nonexistent
Follow Through			Unbelievable		X	Acts On Feedback	X		Reliable			Inconsistent			Forget It
TLC			Authentic	X		Flowing			Now and Then			Forced			What's This
Recognition			In Every Way		X	Special Treatment	X		Once in a While			Never			No Way
SUFFICIENT RESOURCES	YEAR			YEAR			YEAR			YEAR			YEAR		
Time Spent			Enough to Leverage			Good Penetration		X	Adequate for 1st Round	X		A Little Short			Not Enough
Money Available			Plenty		X	Adequate			Compromised	X		Just Barely Enough			Too Little
Program Quality			Classic		X	Staying Power			Sticky	X		Short Termer			One Shot
People Expertise			Pros		X	Fit for Task			Average	X		Stretching It			Asking Too Much
Process			Closed Loop		X	Integrated			Some Coordination			Silos Only			Nonexistent
Technology			Personally Empowering			High Tech, Tech Touch			Advanced Automation		X	Some Automation	X		Behind
SYNERGY	YEAR			YEAR			YEAR			YEAR			YEAR		
Campaign			Leverage		X	Integrated			Neutral	X		Helter Skelter			Opposing
Channel			Seamless			Complementary		X	Open			Disarray			In Conflict
Product/Service		X	Active Up Sell / Cross Sell		X	Customer Migration Path	X		Passive Up Sell / Cross Sell			Unknown			Disparate
Team			Breakthrough Results		X	Flawless Execution	X		Works Well			Don't Talk			Dysfunctional

Instructions: First Score Year 1. Make an additional score for Year 2 and Year 3 only if they will change from Year 1.

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Acquisition Calculator

Strategy Planned   Completed by XYZ Company

OPPORTUNITY	YEAR		YEAR		YEAR		YEAR		YEAR		YEAR		
Customer Need	0 0 0	Riding a Wave	1 0 0	Commodity	0 0 0	Create Market	0 0 0	Wishful	0 1 1	Unknown	5.5	19.5	26.0
Market Size	0 0 0	Large	0 0 0	Medium	1 0 0	Small	0 0 0	Have to Make It	0 1 1	Unknown	1.5	1.5	1.5
Market Maturity	0 0 0	Growing	0 0 0	Emerging	1 0 0	Stable	0 0 0	Shrinking	0 1 1	Unknown	0.0	0.0	0.0
Competition	0 0 0	None	0 0 0	Slight	1 0 0	A Lot	0 1 0	Fierce	0 0 1	Unknown	0.0	-1.0	-1.0
Window of Opportunity	0 0 0	Easy	0 0 0	Doable	0 0 0	Unknown	1 0 0	Narrow	0 1 1	Too Wide	-0.5	-0.5	-0.5
Sales Cycle	0 0 0	Short	0 0 0	Medium	1 0 0	Long	0 0 0	Unknown	0 1 1	Too Long	0.0	0.0	0.0
Limitations/Restrictions	0 0 0	None	0 0 0	Some	1 0 0	Many	0 0 0	Severe	0 1 1	Unknown	0.0	0.0	0.0
Access To Capital	1 0 0	Ready	0 0 0	Some Work	0 0 0	Unknown	0 0 0	Hard to Get	0 1 1	Nonexistent	0.0	0.0	0.0
Capacity	1 0 0	Plenty	0 0 0	Some	0 0 0	Oversupply	0 0 0	None	0 1 1	Unknown	0.0	0.0	0.0

SWING	YEAR		YEAR		YEAR		YEAR		YEAR				
Customer Expectations Shift	0 0 0	Positive	0 0 0	Neutral	0 0 0	Negative	1 0 0	Unclear	0 1 1	Unknown	-1.0	-1.0	-1.0
Innovation	0 0 0	Steady Flow	1 0 0	Proven	0 0 0	Leading Edge	0 0 0	Too Late	0 1 1	None	0.5	0.5	0.5
Economic Conditions	0 0 0	Boom	0 0 0	Cooking	1 0 0	Stable	0 1 0	Tight	0 0 1	Depressed	0.0	-0.5	-0.5

MUST HAVES	YEAR		YEAR		YEAR		YEAR		YEAR				
Quality	1 0 0	Excellent	0 0 0	Good	0 0 0	Poor	0 0 0	Questionable	0 1 1	Unknown	2.0	2.0	2.0
Value for Price	0 0 0	Terrific	1 0 0	Acceptable	0 1 0	Okay	0 0 1	Marginal	0 0 0	Unknown	0.0	0.0	0.0
Commitment	1 0 0	Serious	0 0 0	Somewhat	0 0 0	So-So	0 0 0	Unknown	0 1 1	Nonexistent	1.0	1.0	1.0
Track Record	1 0 0	Totally Relevant	0 0 0	Somewhat Relevant	0 0 0	By Association	0 0 0	Related	0 1 1	None	1.0	1.0	1.0
Trust Worthy	0 0 0	Absolute	1 0 0	Probable	0 0 0	Untested	0 0 0	Questionable	0 1 1	No Way	0.0	0.0	0.0
Information Flow	0 0 0	Readily Available	0 0 0	Open	1 0 0	Upon Request	0 0 0	Tight	0 1 1	Secretive	0.0	0.0	0.0
Easy to Buy/Renew	0 0 0	Piece of Cake	0 0 0	No Problem	1 0 0	Relatively Easy	0 0 0	Takes Work	0 1 1	Like Pulling Teeth	0.0	0.0	0.0

MOMENTUM	YEAR		YEAR		YEAR		YEAR		YEAR				
Brand Equity	0 0 0	Sought After	0 0 0	Established	1 0 0	Arrived	0 0 0	Toe Hold	0 1 1	Ignored	0.0	0.0	0.0
Market Share	0 0 0	Market Leader	1 0 0	Top Ten	0 0 0	In the Pack	0 0 0	Bottom Feeder	0 1 1	None	1.5	1.5	1.5
Customer Share	0 0 0	Maxed Out	0 0 0	Lots of Room	1 0 0	Tiny	0 0 0	Just Starting	0 1 1	None	0.0	0.0	0.0
# of Products/Services	0 0 0	Multiple, Proven	0 0 0	Few Proven	1 0 0	Only One Proven	0 0 0	Few Unproven	0 1 1	Only One, Unproven	0.0	0.0	0.0

BUZZ	YEAR		YEAR		YEAR		YEAR		YEAR				
Reputation	0 0 0	Excellent	1 0 0	Good	0 0 0	Fair	0 0 0	Poor	0 1 1	Unknown	2.5	2.5	2.5
Credibility	0 0 0	Tons	1 0 0	Decent	0 0 0	By Association	0 0 0	Unknown	0 1 1	None	2.5	2.5	2.5
Receptivity	0 0 0	Eager	0 0 0	Open	1 0 0	Neutral	0 0 0	Unknown	0 1 1	Closed	0.0	0.0	0.0
Awareness	0 0 0	Considering	0 0 0	Knowledgeable	1 0 0	Aware	0 0 0	Aided Aware	0 1 1	Unaware	0.0	0.0	0.0
Satisfaction	0 0 0	Partners	1 0 0	Preference	0 1 0	Loyal	0 0 1	Likes	0 0 0	Unhappy	0.0	0.0	0.0

DIFFICULTY	YEAR		YEAR		YEAR		YEAR		YEAR				
Opening	0 0 0	First to Market	0 0 0	What Already Believes	1 0 0	Don't Know Much	0 0 0	Must Change Minds	0 1 1	Take On Others	0.0	0.0	0.0
Difficulty of Action	0 0 0	Existing to Existing	0 0 0	New to Existing	1 0 0	Existing to New	0 0 0	New to New	0 1 1	Totally New Approach	0.0	0.0	0.0
Alternatives	0 0 0	None	0 0 0	Questionable	1 0 0	A Few	0 1 0	Unknown	0 0 1	Tons	0.0	0.0	0.0
Switching Costs/Acquisition	0 0 0	No Problem	0 0 0	Possible	1 0 0	Hassle	0 0 0	Exposure	0 1 1	Integral to Business	0.0	0.0	0.0
Switching Costs/Retention	0 0 0	Integral to Business	1 0 0	Expensive	0 0 0	Hassle	0 0 0	Possible	0 1 1	No Problem	0.0	0.0	0.0
Audience Sophistication	0 0 0	Wants to Believe	0 0 0	Top Level View	0 0 0	Savvy	1 0 0	Questioning Role	0 1 1	Unknown	-0.5	-0.5	-0.5
Difficulty to Reach	0 0 0	Concentrated	0 0 0	Several Pockets	1 0 0	Fragmented	0 0 0	Unclear	0 1 1	Unknown	0.0	0.0	0.0
Audience Resistance	0 0 0	None	0 0 0	Slight	0 0 0	Unknown	1 0 0	Fierce	0 1 1	Inertia	-0.5	-0.5	-0.5
Communication Path	0 0 0	Direct to User	1 0 0	Via Internal Influencers	0 0 0	Unknown	0 0 0	Mediated by Channel	0 1 1	Influenced by Media	1.0	1.0	1.0

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Aquisiton Calculator --CONTINUED



	YEAR	YEAR	YEAR	YEAR	YEAR			
RELATIONSHIPS								
Strengths Of	0 0 1 Steller	1 0 0 Solid	0 0 0 Workable	0 0 0 Marginal	0 1 0 Unclear	0.5	0.5	1.0
Amount Of	0 0 0 Vast Network	0 0 0 Key Network	0 1 0 Key Players	1 0 0 Some Players	0 0 1 None	-0.5	0.0	0.0
Length Of	0 0 0 Long Term	0 0 0 Comfortable	1 0 0 A While	0 0 0 Relatively New	0 1 1 Nonexistent	0.0	0.0	0.0
PROMISE	YEAR	YEAR	YEAR	YEAR	YEAR			
Differentiation	0 0 0 Clear	0 0 1 So-So	1 0 0 Competition Has It	0 0 0 Fuzzy	0 1 0 Unknown	0 0	0.0	0 5
Value Proposition	0 0 0 In Tune w/ Customer Appeal	0 0 1 Understood	1 0 0 Needs Educating	0 0 0 On Another Planet	0 1 0 Unknown	0.0	0.0	1 0
Offer Appeal	0 0 0 Speaks to Customer	0 0 1 Attractive	1 0 0 Exists	0 0 0 Not Important	0 1 0 Unknown	0.0	0.0	1.0
Positioning	0 0 0 Hits Appeal & Value Prop	0 0 1 Hits Appeal	1 0 0 Hits Value Proposition	0 0 0 Misses the Mark Totally	0 1 0 Unknown	0.0	0 0	1.0
Messages	0 0 0 Believable	1 0 0 Acceptable	0 0 0 Convoluted	0 0 0 Unbelievable	0 1 1 Unknown	0 5	0.5	0.5
Image	0 0 1 Consistent/Appropriate	0 0 0 Consistent	1 0 0 Appropriate	0 0 0 Out of Touch	0 1 0 Unknown	0.0	0.0	1.0
Supporting Facts	0 0 0 Great Back Up	1 0 0 Reasonable	0 0 0 Stretching It	0 0 0 Questionable	0 1 1 Smoke 'n' Mirrors	0.5	0 5	0 5
Content Complexity	0 0 0 KISS	0 0 0 8th Grade	1 0 0 High School	0 0 0 College	0 1 1 PhD	0.0	0.0	0.0
Content Depth	0 0 0 Enough to Convince	0 0 0 Enough to Act	1 0 0 Thin	0 0 0 Too Much	0 1 1 Unknown	0.0	0.0	0.0
DELIVERY	YEAR	YEAR	YEAR	YEAR	YEAR			
Overall Contact	0 0 0 Take Ownership	1 0 0 Helpful	0 0 0 Approachable	0 0 0 It's a Job	0 1 1 Disgruntled	0.5	0 5	0.5
Sales Process	0 0 0 Enjoyable	0 1 0 Smooth	1 0 0 Okay	0 0 0 Pressured	0 0 1 Unknown	0.0	0.0	0.0
Fulfillment	0 0 0 Exceeds Expectations	0 1 0 As Promised	1 0 0 No Fanfare	0 0 0 Haphazard	0 0 1 Takes Forever	0.0	0.0	0.0
Use of Products/Services	0 0 0 Hassle-free	1 0 0 Reliable	0 0 0 So-So	0 0 0 A Pain	0 1 1 Unknown	0.0	0.0	0 0
Cust Service/Tech Support	0 0 0 Authority to Make Right	1 0 0 Superior	0 0 0 Responsive	0 0 0 Accessible	0 1 1 Couldn't Care	0.0	0.0	0 0
Community	0 0 0 Integral	1 0 0 Acceptable	0 0 0 Hit or Miss	0 0 0 Poorly Executed	0 1 1 Nonexistent	0.0	0 0	0.0
INTERACTION	YEAR	YEAR	YEAR	YEAR	YEAR			
Exchange	0 0 0 Easy, Welcome	0 1 0 Encouraged	1 0 0 Okay	0 0 0 Put Up With It	0 0 1 Cut Off	0 0	0.5	0.5
Listening	0 0 0 Built In	1 0 0 Extra Mile	0 0 0 Occasional	0 0 0 Lip Service	0 1 1 Nonexistent	0.5	0.5	0.5
Follow Through	0 0 0 Unbelievable	0 1 0 Acts On Feedback	1 0 0 Reliable	0 0 0 Inconsistent	0 0 1 Forget It	0.0	1.0	1.0
TLC	0 0 0 Authentic	1 0 0 Flowing	0 0 0 Now and Then	0 0 0 Forced	0 1 1 What's This	0.0	0.0	0 0
Recognition	0 0 0 In Every Way	0 1 0 Special Treatment	1 0 0 Once In a While	0 0 0 Never	0 0 1 No Way	0.0	0.0	0.0
SUFFICIENT RESOURCES	YEAR	YEAR	YEAR	YEAR	YEAR			
Time Spent	0 0 0 Enough to Leverage	0 0 1 Good Penetration	0 1 0 Adequate for 1st Round	1 0 0 A Little Short	0 0 0 Not Enough	-1.0	0.0	1.0
Money Available	0 0 0 Plenty	0 1 0 Adequate	0 0 0 Compromised	1 0 0 Just Barely Enough	0 0 1 Too Little	-0.5	0.5	0 5
Program Quality	0 0 0 Classic	0 1 0 Staying Power	0 0 0 Sticky	1 0 0 Short Termer	0 0 1 One Shot	-0.5	0 5	0.5
People Expertise	0 0 0 Pros	0 1 0 Fit for Task	0 0 0 Average	1 0 0 Stretching It	0 0 1 Asking Too Much	-1.0	1.0	1.0
Process	0 0 0 Closed Loop	0 1 0 Integrated	1 0 0 Some Coordination	0 0 0 Silos Only	0 0 1 Nonexistent	0 0	1 0	1 0
Technology	0 0 0 Personally Empowering	0 0 0 High Tech, Tech Touch	0 0 0 Advanced Automation	0 1 0 Some Automation	1 0 1 Behind	-2.0	-1.0	-1.0
SYNERGY	YEAR	YEAR	YEAR	YEAR	YEAR			
Campaign	0 0 0 Leverage	0 1 0 Integrated	0 0 0 Neutral	1 0 0 Helter Skelter	0 0 1 Opposing	-2.5	2.5	2.5
Channel	0 0 0 Seamless	0 0 0 Complementary	1 0 0 Open	0 0 0 Disarray	0 1 1 In Conflict	0 0	0 0	0 0
Product/Service	0 0 1 Active Up Sell / Cross Sell	0 1 0 Customer Migration Path	1 0 0 Passive Up Sell / Cross Sell	0 0 0 Unknown	0 0 0 Disparate	0.0	0.5	1.0
Team	0 0 0 Breakthrough Results	0 1 0 Flawless Execution	1 0 0 Works Well	0 0 0 Don't Talk	0 0 1 Dysfunctional	0.0	1.0	1.0

Instructions: First Score Year 1 Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Closing Calculator

Strategy: Planned   Completed by: XYZ Company

	YEAR	YEAR	YEAR	YEAR	YEAR	YEAR		
OPPORTUNITY								
Customer Need	0 0 0 Riding a Wave	1 0 0 Commodity	0 0 0 Create Market	0 0 0 Wishful	0 1 1 Unknown	11.5	19.0	22.0
Market Size	0 0 0 Large	0 0 0 Medium	1 0 0 Small	0 0 0 Have to Make It	0 1 1 Unknown	1.0	1.0	1.0
Market Maturity	0 0 0 Growing	0 0 0 Emerging	1 0 0 Stable	0 0 0 Shrinking	0 1 1 Unknown	0.0	0.0	0.0
Competition	0 0 0 None	0 0 0 Slight	1 0 0 A Lot	0 1 0 Fierce	0 0 1 Unknown	0.0	-1.0	-1.0
Window of Opportunity	0 0 0 Easy	0 0 0 Doable	0 0 0 Unknown	1 0 0 Narrow	0 1 1 Too Wide	0.0	0.0	0.0
Sales Cycle	0 0 0 Short	0 0 0 Medium	1 0 0 Long	0 0 0 Unknown	0 1 1 Too Long	0.0	0.0	0.0
Limitations/Restrictions	0 0 0 None	0 0 0 Some	1 0 0 Many	0 0 0 Severe	0 1 1 Unknown	0.0	0.0	0.0
Access To Capital	1 0 0 Ready	0 0 0 Some Work	0 0 0 Unknown	0 0 0 Hard to Get	0 1 1 Nonexistent	0.0	0.0	0.0
Capacity	1 0 0 Plenty	0 0 0 Some	0 0 0 Oversupply	0 0 0 None	0 1 1 Unknown	0.0	0.0	0.0
SWING								
Customer Expectations Shift	0 0 0 Positive	0 0 0 Neutral	0 0 0 Negative	1 0 0 Unclear	0 1 1 Unknown	-0.5	-0.5	-0.5
Innovation	0 0 0 Steady Flow	1 0 0 Proven	0 0 0 Leading Edge	0 0 0 Too Late	0 1 1 None	0.5	0.5	0.5
Economic Conditions	0 0 0 Boom	0 0 0 Cooking	1 0 0 Stable	0 1 0 Tight	0 0 1 Depressed	0.0	-1.5	-1.5
MUST HAVES								
Quality	1 0 0 Excellent	0 0 0 Good	0 0 0 Poor	0 0 0 Questionable	0 1 1 Unknown	3.0	3.0	3.0
Value for Price	0 0 0 Terrific	1 0 0 Acceptable	0 1 0 Okay	0 0 1 Marginal	0 0 0 Unknown	1.5	0.0	-1.5
Commitment	1 0 0 Serious	0 0 0 Somewhat	0 0 0 So-So	0 0 0 Unknown	0 1 1 Nonexistent	1.0	1.0	1.0
Track Record	1 0 0 Totally Relevant	0 0 0 Somewhat Relevant	0 0 0 By Association	0 0 0 Related	0 1 1 None	1.0	1.0	1.0
Trust Worthy	0 0 0 Absolute	1 0 0 Probable	0 0 0 Untested	0 0 0 Questionable	0 1 1 No Way	0.5	0.5	0.5
Information Flow	0 0 0 Readily Available	0 0 0 Open	1 0 0 Upon Request	0 0 0 Tight	0 1 1 Secretive	0.0	0.0	0.0
Easy to Buy/Renew	0 0 0 Piece of Cake	0 0 0 No Problem	1 0 0 Relatively Easy	0 0 0 Takes Work	0 1 1 Like Pulling Teeth	0.0	0.0	0.0
MOMENTUM								
Brand Equity	0 0 0 Sought After	0 0 0 Established	1 0 0 Arrived	0 0 0 Toe Hold	0 1 1 Ignored	0.0	0.0	0.0
Market Share	0 0 0 Market Leader	1 0 0 Top Ten	0 0 0 In the Pack	0 0 0 Bottom Feeder	0 1 1 None	1.0	1.0	1.0
Customer Share	0 0 0 Maxed Out	0 0 0 Lots of Room	1 0 0 Tiny	0 0 0 Just Starting	0 1 1 None	0.0	0.0	0.0
# of Products/Services	0 0 0 Multiple, Proven	0 0 0 Few Proven	1 0 0 Only One Proven	0 0 0 Few Unproven	0 1 1 Only One, Unproven	0.0	0.0	0.0
BUZZ								
Reputation	0 0 0 Excellent	1 0 0 Good	0 0 0 Fair	0 0 0 Poor	0 1 1 Unknown	2.0	2.0	2.0
Credibility	0 0 0 Tons	1 0 0 Decent	0 0 0 By Association	0 0 0 Unknown	0 1 1 None	2.0	2.0	2.0
Receptivity	0 0 0 Eager	0 0 0 Open	1 0 0 Neutral	0 0 0 Unknown	0 1 1 Closed	0.0	0.0	0.0
Awareness	0 0 0 Considering	0 0 0 Knowledgeable	1 0 0 Aware	0 0 0 Aided Aware	0 1 1 Unaware	0.0	0.0	0.0
Satisfaction	0 0 0 Partners	1 0 0 Preference	0 1 0 Loyal	0 0 1 Likes	0 0 0 Unhappy	0.0	0.0	0.0
DIFFICULTY								
Opening	0 0 0 First to Market	0 0 0 What Already Believes	1 0 0 Don't Know Much	0 0 0 Must Change Minds	0 1 1 Take On Others	0.0	0.0	0.0
Difficulty of Action	0 0 0 Existing to Existing	0 0 0 New to Existing	1 0 0 Existing to New	0 0 0 New to New	0 1 1 Totally New Approach	0.0	0.0	0.0
Alternatives	0 0 0 None	0 0 0 Questionable	1 0 0 A Few	0 1 0 Unknown	0 0 1 Tons	0.0	-1.0	-2.0
Switching Costs/Acquisition	0 0 0 No Problem	0 0 0 Possible	1 0 0 Hassle	0 0 0 Exposure	0 1 1 Integral to Business	0.0	0.0	0.0
Switching Costs/Retention	0 0 0 Integral to Business	1 0 0 Expensive	0 0 0 Hassle	0 0 0 Possible	0 1 1 No Problem	0.0	0.0	0.0
Audience Sophistication	0 0 0 Wants to Believe	0 0 0 Top Level View	0 0 0 Savvy	1 0 0 Questioning Role	0 1 1 Unknown	-0.5	-0.5	-0.5
Difficulty to Reach	0 0 0 Concentrated	0 0 0 Several Pockets	1 0 0 Fragmented	0 0 0 Unclear	0 1 1 Unknown	0.0	0.0	0.0
Audience Resistance	0 0 0 None	0 0 0 Slight	0 0 0 Unknown	1 0 0 Fierce	0 1 1 Inertia	-1.0	-1.0	-1.0
Communication Path	0 0 0 Direct to User	1 0 0 Via Internal Influencers	0 0 0 Unknown	0 0 0 Mediated by Channel	0 1 1 Influenced by Media	0.5	0.5	0.5

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Closing Calculator -- CONTINUED

	YEAR														
RELATIONSHIPS															
Strengths Of	0	0	1	Steller	1	0	0	Solid	0	0	0	Workable	0	0	0	Marginal	0	1	0	Unclear	1.0	1.0	2.0
Amount Of	0	0	0	Vast Network	0	0	0	Key Network	0	1	0	Key Players	1	0	0	Some Players	0	0	1	None	-1.5	0.0	0 0
Length Of	0	0	0	Long Term	0	0	0	Comfortable	1	0	0	A While	0	0	0	Relatively New	0	1	1	Nonexistent	0.0	0.0	0.0
PROMISE	YEAR				YEAR				YEAR				YEAR				YEAR						
Differentiation	0	0	0	Clear	0	0	1	So-So	1	0	0	Competition Has It	0	0	0	Fuzzy	0	1	0	Unknown	0.0	0.0	0.5
Value Proposition	0	0	0	In Tune w/ Customer Appeal	0	0	1	Understood	1	0	0	Needs Educating	0	0	0	On Another Planet	0	1	0	Unknown	0.0	0.0	0.5
Offer Appeal	0	0	0	Speaks to Customer	0	0	1	Attractive	1	0	0	Exists	0	0	0	Not Important	0	1	0	Unknown	0 0	0 0	1.0
Positioning	0	0	0	Hits Appeal & Value Prop	0	0	1	Hits Appeal	1	0	0	Hits Value Proposition	0	0	0	Misses the Mark Totally	0	1	0	Unknown	0.0	0 0	0 5
Messages	0	0	0	Believable	1	0	0	Acceptable	0	0	0	Convoluted	0	0	0	Unbelievable	0	1	1	Unknown	0.0	0.0	0.0
Image	0	0	1	Consistent/Appropriate	0	0	0	Consistent	1	0	0	Appropriate	0	0	0	Out of Touch	0	1	0	Unknown	0.0	0.0	0.0
Supporting Facts	0	0	0	Great Back Up	1	0	0	Reasonable	0	0	0	Stretching It	0	0	0	Questionable	0	1	1	Smoke 'n' Mirrors	1 0	1.0	1.0
Content Complexity	0	0	0	KISS	0	0	0	8th Grade	1	0	0	High School	0	0	0	College	0	1	1	PhD	0 0	0.0	0 0
Content Depth	0	0	0	Enough to Convince	0	0	0	Enough to Act	1	0	0	Thin	0	0	0	Too Much	0	1	1	Unknown	0.0	0 0	0.0
DELIVERY	YEAR				YEAR				YEAR				YEAR				YEAR						
Overall Contact	0	0	0	Take Ownership	1	0	0	Helpful	0	0	0	Approachable	0	0	0	It's a Job	0	1	1	Disgruntled	1.0	1.0	1.0
Sales Process	0	0	0	Enjoyable	0	1	0	Smooth	1	0	0	Okay	0	0	0	Pressured	0	0	1	Unknown	0.0	2.0	2.0
Fulfillment	0	0	0	Exceeds Expectations	0	1	0	As Promised	1	0	0	No Fanfare	0	0	0	Haphazard	0	0	1	Takes Forever	0.0	0.0	0.0
Use of Products/Services	0	0	0	Hassle-free	1	0	0	Reliable	0	0	0	So-So	0	0	0	A Pain	0	1	1	Unknown	0.0	0.0	0.0
Cust Service/Tech Support	0	0	0	Authority to Make Right	1	0	0	Superior	0	0	0	Responsive	0	0	0	Accessible	0	1	1	Couldn't Care	0.0	0.0	0.0
Community	0	0	0	Integral	1	0	0	Acceptable	0	0	0	Hit or Miss	0	0	0	Poorly Executed	0	1	1	Nonexistent	0.0	0 0	0.0
INTERACTION	YEAR				YEAR				YEAR				YEAR				YEAR						
Exchange	0	0	0	Easy, Welcome	0	1	0	Encouraged	1	0	0	Okay	0	0	0	Put Up With It	0	0	1	Cut Off	0 0	1 0	1 0
Listening	0	0	0	Built In	1	0	0	Extra Mile	0	0	0	Occasional	0	0	0	Lip Service	0	1	1	Nonexistent	1.0	1 0	1 0
Follow Through	0	0	0	Unbellevable	0	1	0	Acts On Feedback	1	0	0	Reliable	0	0	0	Inconsistent	0	0	1	Forget It	0.0	1 0	1.0
TLC	0	0	0	Authentic	1	0	0	Flowing	0	0	0	Now and Then	0	0	0	Forced	0	1	1	What's This	0.0	0 0	0.0
Recognition	0	0	0	In Every Way	0	1	0	Special Treatment	1	0	0	Once in a While	0	0	0	Never	0	0	1	No Way	0.0	0.0	0.0
SUFFICIENT RESOURCES	YEAR				YEAR				YEAR				YEAR				YEAR						
Time Spent	0	0	0	Enough to Leverage	0	0	1	Good Penetration	0	1	0	Adequate for 1st Round	1	0	0	A Little Short	0	0	0	Not Enough	-1.0	0 0	1.0
Money Available	0	0	0	Plenty	0	1	0	Adequate	0	0	0	Compromised	1	0	0	Just Barely Enough	0	0	1	Too Little	-0.5	0.5	0 5
Program Quality	0	0	0	Classic	0	1	0	Staying Power	0	0	0	Sticky	1	0	0	Short Termer	0	0	1	One Shot	0.0	0.0	0 0
People Expertise	0	0	0	Pros	0	1	0	Fit for Task	0	0	0	Average	1	0	0	Stretching It	0	0	1	Asking Too Much	-1 0	1 0	1.0
Process	0	0	0	Closed Loop	0	1	0	Integrated	1	0	0	Some Coordination	0	0	0	Silos Only	0	0	1	Nonexistent	0.0	0.5	0.5
Technology	0	0	0	Personally Empowering	0	0	0	High Tech, Tech Touch	0	0	0	Advanced Automation	0	1	0	Some Automation	1	0	1	Behind	0.0	0.0	0.0
SYNERGY	YEAR				YEAR				YEAR				YEAR				YEAR						
Campaign	0	0	0	Leverage	0	1	0	Integrated	0	0	0	Neutral	1	0	0	Helter Skelter	0	0	1	Opposing	-0.5	0.5	0.5
Channel	0	0	0	Seamless	0	0	0	Complementary	1	0	0	Open	0	0	0	Disarray	0	1	1	In Conflict	0.0	0 0	0.0
Product/Service	0	0	1	Active Up Sell / Cross Sell	0	1	0	Customer Migration Path	1	0	0	Passive Up Sell / Cross Sell	0	0	0	Unknown	0	0	0	Disparate	0.0	1.0	2 0
Team	0	0	0	Breakthrough Results	0	1	0	Flawless Execution	1	0	0	Works Well	0	0	0	Don't Talk	0	0	1	Dysfunctional	0.0	0.5	0.5

Instructions: First Score Year 1 Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Retention Calculator

Strategy: Planned

Completed by: XYZ Company

	YEAR	YEAR	YEAR	YEAR	YEAR	YEAR		
OPPORTUNITY						20.0	27.0	26.0
Customer Need	0 0 0 Riding a Wave	1 0 0 Commodity	0 0 0 Create Market	0 0 0 Wishful	0 1 1 Unknown	0.0	0.0	0.0
Market Size	0 0 0 Large	0 0 0 Medium	1 0 0 Small	0 0 0 Have to Make It	0 1 1 Unknown	0.0	0.0	0.0
Market Maturity	0 0 0 Growing	0 0 0 Emerging	1 0 0 Stable	0 0 0 Shrinking	0 1 1 Unknown	0.0	0.0	0.0
Competition	0 0 0 None	0 0 0 Slight	1 0 0 A Lot	0 1 0 Fierce	0 0 1 Unknown	0.0	-1.0	-1.0
Window of Opportunity	0 0 0 Easy	0 0 0 Doable	0 0 0 Unknown	1 0 0 Narrow	0 1 1 Too Wide	0.0	0.0	0.0
Sales Cycle	0 0 0 Short	0 0 0 Medium	1 0 0 Long	0 0 0 Unknown	0 1 1 Too Long	0.0	0.0	0.0
Limitations/Restrictions	0 0 0 None	0 0 0 Some	1 0 0 Many	0 0 0 Severe	0 1 1 Unknown	0.0	0.0	0.0
Access To Capital	1 0 0 Ready	0 0 0 Some Work	0 0 0 Unknown	0 0 0 Hard to Get	0 1 1 Nonexistent	1.0	1.0	1.0
Capacity	1 0 0 Plenty	0 0 0 Some	0 0 0 Oversupply	0 0 0 None	0 1 1 Unknown	1.0	1.0	1.0
SWING	YEAR	YEAR	YEAR	YEAR	YEAR			
Customer Expectations Shift	0 0 0 Positive	0 0 0 Neutral	0 0 0 Negative	1 0 0 Unclear	0 1 1 Unknown	-1.5	-1.5	-1.5
Innovation	0 0 0 Steady Flow	1 0 0 Proven	0 0 0 Leading Edge	0 0 0 Too Late	0 1 1 None	0.5	0.5	0.5
Economic Conditions	0 0 0 Boom	0 0 0 Cooking	1 0 0 Stable	0 1 0 Tight	0 0 1 Depressed	0.0	-0.5	-0.5
MUST HAVES	YEAR	YEAR	YEAR	YEAR	YEAR			
Quality	1 0 0 Excellent	0 0 0 Good	0 0 0 Poor	0 0 0 Questionable	0 1 1 Unknown	2.0	2.0	2.0
Value for Price	0 0 0 Terrific	1 0 0 Acceptable	0 1 0 Okay	0 0 1 Marginal	0 0 0 Unknown	2.0	0.0	-2.0
Commitment	1 0 0 Serious	0 0 0 Somewhat	0 0 0 So-So	0 0 0 Unknown	0 1 1 Nonexistent	0.0	0.0	0.0
Track Record	1 0 0 Totally Relevant	0 0 0 Somewhat Relevant	0 0 0 By Association	0 0 0 Related	0 1 1 None	0.0	0.0	0.0
Trust Worthy	0 0 0 Absolute	1 0 0 Probable	0 0 0 Untested	0 0 0 Questionable	0 1 1 No Way	1.0	1.0	1.0
Information Flow	0 0 0 Readily Available	0 0 0 Open	1 0 0 Upon Request	0 0 0 Tight	0 1 1 Secretive	0.0	0.0	0.0
Easy to Buy/Renew	0 0 0 Piece of Cake	0 0 0 No Problem	1 0 0 Relatively Easy	0 0 0 Takes Work	0 1 1 Like Pulling Teeth	0.0	0.0	0.0
MOMENTUM	YEAR	YEAR	YEAR	YEAR	YEAR			
Brand Equity	0 0 0 Sought After	0 0 0 Established	1 0 0 Arrived	0 0 0 Toe Hold	0 1 1 Ignored	0.0	0.0	0.0
Market Share	0 0 0 Market Leader	1 0 0 Top Ten	0 0 0 In the Pack	0 0 0 Bottom Feeder	0 1 1 None	0.5	0.5	0.5
Customer Share	0 0 0 Maxed Out	0 0 0 Lots of Room	1 0 0 Tiny	0 0 0 Just Starting	0 1 1 None	0.0	0.0	0.0
# of Products/Services	0 0 0 Multiple, Proven	0 0 0 Few Proven	1 0 0 Only One Proven	0 0 0 Few Unproven	0 1 1 Only One, Unproven	0.0	0.0	0.0
BUZZ	YEAR	YEAR	YEAR	YEAR	YEAR			
Reputation	0 0 0 Excellent	1 0 0 Good	0 0 0 Fair	0 0 0 Poor	0 1 1 Unknown	0.0	0.0	0.0
Credibility	0 0 0 Tons	1 0 0 Decent	0 0 0 By Association	0 0 0 Unknown	0 1 1 None	0.5	0.5	0.5
Receptivity	0 0 0 Eager	0 0 0 Open	1 0 0 Neutral	0 0 0 Unknown	0 1 1 Closed	0.0	0.0	0.0
Awareness	0 0 0 Considering	0 0 0 Knowledgeable	1 0 0 Aware	0 0 0 Aided Aware	0 1 1 Unaware	0.0	0.0	0.0
Satisfaction	0 0 0 Partners	1 0 0 Preference	0 1 0 Loyal	0 0 1 Likes	0 0 0 Unhappy	2.0	0.0	-2.0
DIFFICULTY	YEAR	YEAR	YEAR	YEAR	YEAR			
Opening	0 0 0 First to Market	0 0 0 What Already Believes	1 0 0 Don't Know Much	0 0 0 Must Change Minds	0 1 1 Take On Others	0.0	0.0	0.0
Difficulty of Action	0 0 0 Existing to Existing	0 0 0 New to Existing	1 0 0 Existing to New	0 0 0 New to New	0 1 1 Totally New Approach	0.0	0.0	0.0
Alternatives	0 0 0 None	0 0 0 Questionable	1 0 0 A Few	0 1 0 Unknown	0 0 1 Tons	0.0	-1.5	-3.0
Switching Costs/Acquisition	0 0 0 No Problem	0 0 0 Possible	1 0 0 Hassle	0 0 0 Exposure	0 1 1 Integral to Business	0.0	0.0	0.0
Switching Costs/Retention	0 0 0 Integral to Business	1 0 0 Expensive	0 0 0 Hassle	0 0 0 Possible	0 1 1 No Problem	3.5	3.5	3.5
Audience Sophistication	0 0 0 Wants to Believe	0 0 0 Top Level View	0 0 0 Savvy	1 0 0 Questioning Role	0 1 1 Unknown	0.0	0.0	0.0
Difficulty to Reach	0 0 0 Concentrated	0 0 0 Several Pockets	1 0 0 Fragmented	0 0 0 Unclear	0 1 1 Unknown	0.0	0.0	0.0
Audience Resistance	0 0 0 None	0 0 0 Slight	0 0 0 Unknown	1 0 0 Fierce	0 1 1 Inertia	0.0	0.0	0.0
Communication Path	0 0 0 Direct to User	1 0 0 Via Internal Influencers	0 0 0 Unknown	0 0 0 Mediated by Channel	0 1 1 Influenced by Media	0.0	0.0	0.0

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Retention Calculator -- CONTINUED

	YEAR	YEAR	YEAR	YEAR	YEAR			
RELATIONSHIPS								
Strengths Of	0 0 1 Steller	1 0 0 Solid	0 0 0 Workable	0 0 0 Marginal	0 1 0 Unclear	1.5	1.5	3.0
Amount Of	0 0 0 Vast Network	0 0 0 Key Network	0 1 0 Key Players	1 0 0 Some Players	0 0 1 None	-1.5	0.0	0.0
Length Of	0 0 0 Long Term	0 0 0 Comfortable	1 0 0 A While	0 0 0 Relatively New	0 1 1 Nonexistent	0.0	0.0	0.0
PROMISE								
Differentiation	0 0 0 Clear	0 0 1 So-So	1 0 0 Competition Has It	0 0 0 Fuzzy	0 1 0 Unknown	0.0	0.0	0.0
Value Proposition	0 0 0 In Tune w/ Customer Appeal	0 0 1 Understood	1 0 0 Needs Educating	0 0 0 On Another Planet	0 1 0 Unknown	0.0	0.0	1.0
Offer Appeal	0 0 0 Speaks to Customer	0 0 1 Attractive	1 0 0 Exists	0 0 0 Not Important	0 1 0 Unknown	0.0	0.0	0.5
Positioning	0 0 0 Hits Appeal & Value Prop	0 0 1 Hits Appeal	1 0 0 Hits Value Proposition	0 0 0 Misses the Mark Totally	0 1 0 Unknown	0.0	0.0	0.0
Messages	0 0 0 Believable	1 0 0 Acceptable	0 0 0 Convoluted	0 0 0 Unbelievable	0 1 1 Unknown	0.0	0.0	0.0
Image	0 0 1 Consistent/Appropriate	0 0 0 Consistent	1 0 0 Appropriate	0 0 0 Out of Touch	0 1 0 Unknown	0.0	0.0	0.0
Supporting Facts	0 0 0 Great Back Up	1 0 0 Reasonable	0 0 0 Stretching It	0 0 0 Questionable	0 1 1 Smoke 'n' Mirrors	0.5	0.5	0.5
Content Complexity	0 0 0 KISS	0 0 0 8th Grade	1 0 0 High School	0 0 0 College	0 1 1 PhD	0.0	0.0	0.0
Content Depth	0 0 0 Enough to Convince	0 0 0 Enough to Act	1 0 0 Thin	0 0 0 Too Much	0 1 1 Unknown	0.0	0.0	0.0
DELIVERY								
Overall Contact	0 0 0 Take Ownership	1 0 0 Helpful	0 0 0 Approachable	0 0 0 It's a Job	0 1 1 Disgruntled	0.5	0.5	0.5
Sales Process	0 0 0 Enjoyable	0 1 0 Smooth	1 0 0 Okay	0 0 0 Pressured	0 0 1 Unknown	0.0	0.5	0.5
Fulfillment	0 0 0 Exceeds Expectations	0 1 0 As Promised	1 0 0 No Fanfare	0 0 0 Haphazard	0 0 1 Takes Forever	0.0	1.5	1.5
Use of Products/Services	0 0 0 Hassle-free	1 0 0 Reliable	0 0 0 So-So	0 0 0 A Pain	0 1 1 Unknown	4.5	4.5	4.5
Cust Service/Tech Support	0 0 0 Authority to Make Right	1 0 0 Superior	0 0 0 Responsive	0 0 0 Accessible	0 1 1 Couldn't Care	1.5	1.5	1.5
Community	0 0 0 Integral	1 0 0 Acceptable	0 0 0 Hit or Miss	0 0 0 Poorly Executed	0 1 1 Nonexistent	1.5	1.5	1.5
INTERACTION								
Exchange	0 0 0 Easy, Welcome	0 1 0 Encouraged	1 0 0 Okay	0 0 0 Put Up With It	0 0 1 Cut Off	0.0	1.0	1.0
Listening	0 0 0 Built In	1 0 0 Extra Mile	0 0 0 Occasional	0 0 0 Up Service	0 1 1 Nonexistent	1.0	1.0	1.0
Follow Through	0 0 0 Unbelievable	0 1 0 Acts On Feedback	1 0 0 Reliable	0 0 0 Inconsistent	0 0 1 Forget It	0.0	1.5	1.5
TLC	0 0 0 Authentic	1 0 0 Flowing	0 0 0 Now and Then	0 0 0 Forced	0 1 1 What's This	2.0	2.0	2.0
Recognition	0 0 0 In Every Way	0 1 0 Special Treatment	1 0 0 Once in a While	0 0 0 Never	0 0 1 No Way	0.0	2.0	2.0
SUFFICIENT RESOURCES								
Time Spent	0 0 0 Enough to Leverage	0 0 1 Good Penetration	0 1 0 Adequate for 1st Round	1 0 0 A Little Short	0 0 0 Not Enough	-0.5	0.0	0.5
Money Available	0 0 0 Plenty	0 1 0 Adequate	0 0 0 Compromised	1 0 0 Just Barely Enough	0 0 1 Too Little	-0.5	0.5	0.5
Program Quality	0 0 0 Classic	0 1 0 Staying Power	0 0 0 Sticky	1 0 0 Short Termer	0 0 1 One Shot	0.0	0.0	0.0
People Expertise	0 0 0 Pros	0 1 0 Fit for Task	0 0 0 Average	1 0 0 Stretching It	0 0 1 Asking Too Much	-1.0	1.0	1.0
Process	0 0 0 Closed Loop	0 1 0 Integrated	1 0 0 Some Coordination	0 0 0 Silos Only	0 0 1 Nonexistent	0.0	0.0	0.0
Technology	0 0 0 Personally Empowering	0 0 0 High Tech, Tech Touch	0 0 0 Advanced Automation	0 1 0 Some Automation	1 0 1 Behind	-2.0	-1.0	-1.0
SYNERGY								
Campaign	0 0 0 Leverage	0 1 0 Integrated	0 0 0 Neutral	1 0 0 Helter Skelter	0 0 1 Opposing	0.0	0.0	0.0
Channel	0 0 0 Seamless	0 0 0 Complementary	1 0 0 Open	0 0 0 Disarray	0 1 1 In Conflict	0.0	0.0	0.0
Product/Service	0 0 1 Active Up Sell / Cross Sell	0 1 0 Customer Migration Path	1 0 0 Passive Up Sell / Cross Sell	0 0 0 Unknown	0 0 0 Disparate	0.0	1.0	2.0
Team	0 0 0 Breakthrough Results	0 1 0 Flawless Execution	1 0 0 Works Well	0 0 0 Don't Talk	0 0 1 Dysfunctional	0.0	0.5	0.5

Instructions: First Score Year 1. Make an additional score for year 2 and Year 3 only if they will change from Year 1.

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Strategic Brand Readiness (SBR) Report by Strategy

Client: XYZ Company
Strategy: Planned



Phase Allocation	Max %	Year 1	Year 2	Year 3
Acquisition	+/- 2	0.1%	0.4%	0.5%
Closing	+/- 3	0.3%	0.6%	0.7%
Retention	+/- 5	1.0%	1.4%	1.3%
SBR FACTOR	+/- 10	**1.4%**	**2.4%**	**2.5%**

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APPENDIX - D

Customer LifeCycle Profitability Model XYZ Company

The following is an example of how the Customer LifeCycle Profitability Model is utilized by a company, e.g., XYZ Company. The Customer LifeCycle Profitability Model supplemented by an Interaction ROI Model is used to help quantify Front Office strategy and relationship performance to compare past performance with assumptions about anticipated future performance and actual future performance.

To provide information for the model, management completes a Customer LifeCycle Profitability Model Template Page 1 and Page 2, shown in Appendix E, pages E-5 through E-7 for Status Quo best and worst case scenarios and two alternative Marketing Strategies with best and worst case scenarios. The information includes Front Office and financial data as well as the appropriate SBR Factor and management's assumptions for performance given the various strategies. An example of how XYZ Company completed these templates and the resulting calculations by the model is shown on pages D-3 through D-17.

The model presents the results for comparison in the Customer LifeCycle Profitability Model Alternative Strategies Scenario Comparison, organized by Status Quo Best and Worst Case, then Alternative #1 Best and Worst Case, followed by Alternative #2 Best and Worst Case, shown on pages D-18 through D-20. A fourth page, D-21 , presents all three Bottom Lines and requires the user to Select either Best or Worst Case of each strategy for inclusion on the report, Customer LifeCycle Profitability Model Alternative Strategies Comparison, page D-22, also shown as a blank in Appendix E, page E-13.

Once management commits to a particular strategy for implementation, the Customer LifeCycle Profitability Model associated with it is double checked by looking at tactical requirements and assumptions in more detail by completing the Interaction ROI (I ROI) Template, shown in Appendix E, pages E-8. Adjustments are made in the new marketing strategy Customer LifeCycle Profitability Model as needed. The combination of the anticipated metrics in the Customer LifeCycle Profitability Model and I ROI Model form the baseline for future analysis of success in implementation.

In this example, the management commitment is to attempt to achieve the anticipated results of at least the worst case of Alternative #2 which may bring the XYZ Company several million more dollars of profit over the three-year period than if they stayed with Status Quo even in a best case or used Alternative #1 and achieve worst case results.

Upon implementation, data from the tracking system feeds a Tracking Mode I ROI Model which in turn flows to the Customer LifeCycle Profitability Model for comparison with what was anticipated in plan and the old status quo for year one. Adjustments are made to anticipate a new forecast for years two and three. A summary of the models for Status Quo, Planned and Actual strategies is kept on a Customer LifeCycle Profitability Model Summary Report shown as a blank in Appendix E, pages E-14 and E-15.

Customer LifeCycle Profitability Model Input Page 1

Client: XYZ Company
Strategy: Status Quo

Scenario: Best Case



Revenue Last Year	Actual	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Starting Customers	290	270	242	218	
New Customers w/out Referral	10	10	10	10	Holds steady
New Customers w/ Referral	20	22	21	19	
Total Customers	320	302	273	247	
Ending Customers	270	242	218	198	
Revenue	112,000,000	105,700,000	95,550,000	86,450,000	
Profit Margin (Income before taxes/Revenue)	33%	33%	33%	33%	
Ave. Yearly Sale (Revenue/Total Customers)	350,000	350,000	350,000	350,000	Holds steady
Referral Rate* (New Customers w/ Referral/ Starting Customers)	7%	7%	7%	7%	Holds steady
Retention Rate* (Ending Customers/Total Customers)	84%	80%	80%	80%	Slips some
Profit Adjustments					
Strategic Brand Readiness (SBR) Factor		1.4%	1.0%	0.6%	In decline
NPV (Net Present Value) Discount Rate		1.00	1.20	1.44	Default

*Rates used to forecast customers in next year

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D-3

Customer LifeCycle Profitability Model Input Page 1

Client: XYZ Company
Strategy: Status Quo
Scenario: Worst Case

Revenue* (Last Year 2)	Actual	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Starting Customers	290	270	242	205	
New Customers w/out Referral	10	10	10	10	Holds steady
New Customers w/ Referral	20	22	18	16	
Total Customers	320	302	270	231	
Ending Customers	270	242	205	166	
Revenue	112,000,000	100,566,000	85,590,000	69,762,000	
Profit Margin (Income before taxes/Revenue)	33%	30%	30%	29%	
Ave. Yearly Sale (Revenue/Total Customers)	350,000	333,000	317,000	302,000	5% decline
Referral Rate* (New Customers w/ Referral/ Starting Customers)	7%	6%	6%	6%	Slips
Retention Rate* (Ending Customers/Total Customers)	84%	80%	76%	72%	Vulnerable
Profit Adjustments					
Strategic Brand Readiness (SBR) Factor		1.4%	1.0%	0.6%	In decline
NPV (Net Present Value) Discount Rate		1.00	1.20	1.44	Default

*Rates used to forecast customers in next year.

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Customer LifeCycle Profitability Model Input Page 2

Client: XYZ Company
Strategy: Status Quo **Scenario: Best Case**

Costs	Variables	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent		60%	60%	60%	Historic
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral		300	300	300	
Contacts In Play w/ Referral		63	60	54	
Incremental Costs per Contact	5,000	1,815,000	1,800,000	1,770,000	
Total Fixed Costs		50,000	50,000	50,000	Website, brochure
Cold to Qualified Lead Rate w/ out Referral		10%	10%	10%	Historic
Cold to Qualified Lead Rate w/ Referral		70%	70%	70%	Historic
Closing (initial)					
Contacts In Play w/ out Referral		30	30	30	
Contacts In Play w/ Referral		44	42	38	
Incremental Costs per Contact	12,000	888,000	864,000	816,000	Historic
Commission Costs	2%	224,000	217,000	203,000	Historic
Total Fixed Costs		50,000	50,000	50,000	Update presentation
Qualified Lead to Initial Sale Rate w/ out Referral		33%	33%	33%	Historic
Qualified Lead to Initial Sale Rate w/ Referral		50%	50%	50%	Historic
Closing (Renewal)					
Percent Contracts Up for Renewal		15%	15%	15%	Historic
Contacts In Play		45	41	37	
Incremental Costs per Contact	10,000	450,000	410,000	370,000	Historic
Commission Costs	2%	252,000	231,000	210,000	Historic
Total Fixed Costs		50,000	50,000	50,000	Update presentation
Potential Renewal to Renewal Sale Rate		80%	80%	80%	
Retention					
Contacts In Play		302	273	247	
Incremental Costs	10,000	3,020,000	2,730,000	2,470,000	
Total Fixed Costs		50,000	50,000	50,000	Update training package
Investments					
Infrastructure					
Front Office		50,000	50,000	50,000	Software, training
Back Office		-	-	-	
Brand Readiness					
Front Office		-	-	-	
Back Office		75,000	75,000	75,000	Corporate ID package

Description

Back Office Costs Cost of Goods/Services Sold, Overhead
Incremental Costs Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan)
Fixed Costs Preparation of tactics for implementation plus related ancillary program costs.
Infrastructure Investments: People, process, technology improvements in efficiency, capability
Brand Readiness Investments Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness

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Customer LifeCycle Profitability Model Input Page 2

Client: XYZ Company

Strategy: Status Quo **Scenario Worst Case ,**

Costs	Variables	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent		62%	62%	62%	Have to do more to serve
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral		330	330	330	
Contacts In Play w/ Referral		67	54	49	
Incremental Costs per Contact	5,000	1,985,000	1,920,000	1,895,000	
Total Fixed Costs		50,000	50,000	50,000	Website, brochure
Cold to Qualified Lead Rate w/ out Referral		10%	10%	10%	Historic
Cold to Qualified Lead Rate w/ Referral		70%	70%	70%	Historic
Closing (initial)					
Contacts In Play w/ out Referral		33	33	33	
Contacts In Play w/ Referral		47	38	34	
Incremental Costs per Contact	13,000	1,040,000	923,000	871,000	More effort
Commission Costs	2%	213,120	177,520	157,040	Historic
Total Fixed Costs		50,000	50,000	50,000	Update presentation
Qualified Lead to Initial Sale Rate w/ out Referral		30%	30%	30%	Harder to sell
Qualified Lead to Initial Sale Rate w/ Referral		47%	47%	47%	Harder to sell
Closing (Renewal)					
Percent Contracts Up for Renewal		15%	15%	15%	Historic
Contacts In Play		45	41	35	
Incremental Costs per Contact	10,000	450,000	410,000	350,000	
Commission Costs	2%	239,760	196,540	151,000	
Total Fixed Costs		50,000	50,000	50,000	Update presentation
Potential Renewal to Renewal Sale Rate		80%	76%	72%	
Retention					
Contacts In Play		302	270	231	
Incremental Costs	12,000	3,624,000	3,240,000	2,772,000	Have to do more to keep
Total Fixed Costs		50,000	50,000	50,000	Update training package
Investments					
Infrastructure					
Front Office		50,000	50,000	50,000	Software, training
Back Office		0	0	0	
Brand Readiness					
Front Office		0	0	0	
Back Office		75,000	75,000	75,000	Corporate ID package

Description

Back Office Costs: Cost of Goods/Services Sold, Overhead

Incremental Costs, Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan)

Fixed Costs: Preparation of tactics for implementation plus related ancillary program costs.

Infrastructure Investments People, process, technology improvements in efficiency, capability.

Brand Readiness Investments Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness

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Customer LifeCycle Profitability Model Input Page 3

Client: XYZ Company

Strategy: Status Quo

Best Case			
Cost	70,394,000	63,907,000	58,034,000
Profit	35,306,000	31,643,000	28,416,000
SBR	1.4%	1.0%	0.6%
Adjusted Gross Profit	35,800,284	31,959,430	28,586,496
NPV	35,800,284	26,632,858	19,851,733
Cumulative NPV	35,800,284	62,433,142	82,284,875
CLV	118,544	206,732	272,466
Average Profit per Customer	118,544	97,556	80,371

Worst Case			
Cost	70,227,800	60,257,860	49,773,480
Profit	30,338,200	25,332,140	19,988,520
SBR	1.4%	1.0%	0.6%
Adjusted Gross Profit	30,762,935	25,585,461	20,108,451
NPV	30,762,935	21,321,218	13,964,202
Cumulative NPV	30,762,935	52,084,153	66,048,355
CLV	101,864	172,464	218,703
Average Profit per Customer	101,864	78,967	60,451

Customer LifeCycle Profitability Model Input Page 1

Client: XYZ Company
Strategy: Alternative #1

Scenario: Best Case

Revenue Last Year	Actual	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Starting Customers	290	270	260	253	
New Customers w/out Referral	10	10	10	10	Holds steady
New Customers w/ Referral	20	22	24	24	
Total Customers	320	302	294	287	
Ending Customers	270	260	253	247	
Revenue	112,000,000	110,985,000	113,447,250	116,283,503	
Profit Margin (Income before taxes/Revenue)	33%	34%	35%	35%	
Ave. Yearly Sale (Revenue/Total Customers)	350,000	367,500	385,875	405,169	Historic 5% growth
Referral Rate* (New Customers w/ Referral/ Starting Customers)	7%	8%	8%	8%	Program improves it
Retention Rate* (Ending Customers/Total Customers)	84%	86%	86%	86%	Program improves it
Profit Adjustments					
Strategic Brand Readiness (SBR) Factor		1.4%	2.4%	2.5%	Improves
NPV (Net Present Value) Discount Rate		1.00	1.20	1.44	Default

*Rates used to forecast customers in next year

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Customer LifeCycle Profitability Model Input Page 1

Client: XYZ Company

Strategy: Alternative #1

Scenario: Worst Case



Revenue Last Year	Actual	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Starting Customers	290	270	254	239	
New Customers w/out Referral	10	10	10	10	Holds steady
New Customers w/ Referral	20	22	21	20	
Total Customers	320	302	285	269	
Ending Customers	270	254	239	226	
Revenue	112,000,000	105,700,000	99,750,000	94,150,000	
Profit Margin (Income before taxes/Revenue)	33%	32%	32%	32%	
Ave. Yearly Sale (Revenue/Total Customers)	350,000	350,000	350,000	350,000	Stabilizes
Referral Rate* (New Customers w/ Referral/ Starting Customers)	7%	7%	7%	7%	Stabilizes
Retention Rate* (Ending Customers/Total Customers)	84%	84%	84%	84%	Stabilizes
Profit Adjustments					
Strategic Brand Readiness (SBR) Factor		1.4%	2.4%	2.5%	Improves
NPV (Net Present Value) Discount Rate		1.00	1.20	1.44	Default

*Rates used to forecast customers in next year

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Customer LifeCycle Profitability Model Input Page 2

Client: XYZ Company

Strategy: Alternative #1 **Scenario: Best Case**

Costs	Variables	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent		**58%**	**58%**	**58%**	Less work w/automation
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral		300	300	300	
Contacts In Play w/ Referral		53	59	59	
Incremental Costs per Contact	5,000	1,765,000	1,795,000	1,795,000	Historic
Total Fixed Costs		50,000	50,000	50,000	Historic
Cold to Qualified Lead Rate w/ out Referral		10%	10%	10%	Historic
Cold to Qualified Lead Rate w/ Referral		75%	75%	75%	Easier w/program
Closing (initial)					
Contacts In Play w/ out Referral		30	30	30	
Contacts In Play w/ Referral		40	44	44	
Incremental Costs per Contact	12,000	840,000	888,000	888,000	Historic
Commission Costs	2%	235,200	262,395	275,515	Historic
Total Fixed Costs		50,000	50,000	50,000	Historic
Qualified Lead to Initial Sale Rate w/ out Referral		33%	33%	33%	Historic
Qualified Lead to Initial Sale Rate w/ Referral		55%	55%	55%	Easier w/program
Closing (Renewal)					
Percent Contracts Up for Renewal		15%	15%	15%	Historic
Contacts In Play		45	44	43	
Incremental Costs per Contact	10,000	450,000	440,000	430,000	Historic
Commission Costs	2%	286,650	293,265	299,825	Historic
Total Fixed Costs		50,000	50,000	50,000	Historic
Potential Renewal to Renewal Sale Rate		86%	86%	86%	
Retention					
Contacts In Play		302	294	287	
Incremental Costs	10,000	3,020,000	2,940,000	2,870,000	Historic
Total Fixed Costs		400,000	400,000	400,000	Adds referral program
Investments					
Infrastructure					
Front Office		50,000	50,000	50,000	Historic
Back Office		300,000	-	-	Automates info flow
Brand Readiness					
Front Office		1,000,000	1,000,000	1,000,000	Adds influencer program
Back Office		75,000	75,000	75,000	Historic

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Description

Back Office Costs Cost of Goods/Services Sold, Overhead

Incremental Costs Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan)

Fixed Costs: Preparation of tactics for implementation plus related ancillary program costs

Infrastructure Investments: People, process, technology improvements in efficiency, capability

Brand Readiness Investments Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness

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Customer LifeCycle Profitability Model Input Page 2

Client: XYZ Company

Strategy: Alternative #1

Scenario: Worst Case

Costs	Variable	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent		**60%**	**60%**	**60%**	Kept in check w/automation
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral		330	330	330	
Contacts In Play w/ Referral		58	56	53	
Incremental Costs per Contact	5,000	1,940,000	1,930,000	1,915,000	Historic
Total Fixed Costs		50,000	50,000	50,000	Historic
Cold to Qualified Lead Rate w/ out Referral		10%	10%	10%	Historic
Cold to Qualified Lead Rate w/ Referral		72%	72%	72%	Somewhat easier w/program
Closing (initial)					
Contacts In Play w/ out Referral		33	33	33	
Contacts In Play w/ Referral		42	40	38	
Incremental Costs per Contact	12,000	900,000	876,000	852,000	Historic
Commission Costs	2%	224,000	217,000	210,000	Historic
Total Fixed Costs		50,000	50,000	50,000	Historic
Qualified Lead to Initial Sale Rate w/ out Referral		30%	30%	30%	Harder to sell w/competition
Qualified Lead to Initial Sale Rate w/ Referral		52%	52%	52%	Somewhat easier w/prog.
Closing (Renewal)					
Percent Contracts Up for Renewal		15%	15%	15%	Historic
Contacts In Play		45	43	40	
Incremental Costs per Contact	10,000	450,000	430,000	400,000	Historic
Commission Costs	2%	266,000	252,000	238,000	Historic
Total Fixed Costs		50,000	50,000	50,000	Historic
Potential Renewal to Renewal Sale Rate		84%	84%	84%	
Retention					
Contacts In Play		302	285	269	
Incremental Costs	10,000	3,020,000	2,850,000	2,690,000	Historic
Total Fixed Costs		400,000	400,000	400,000	Adds referral program
Investments					
Infrastructure					
Front Office		50,000	50,000	50,000	Historic
Back Office		300,000	-	-	Automates info flow
Brand Readiness					
Front Office		1,000,000	1,000,000	1,000,000	Adds influencer program
Back Office		75,000	75,000	75,000	Historic

Description

Back Office Costs: Cost of Goods/Services Sold, Overhead

Incremental Costs: Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan)

Fixed Costs: Preparation of tactics for implementation plus related ancillary program costs

Infrastructure Investments: People, process, technology improvements in efficiency, capability

Brand Readiness Investments: Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness

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Customer LifeCycle Profitability Model Input Page 3

Client: XYZ Company

Strategy: Alternative #1

Best Case			
Cost	72,943,150	74,093,065	75,677,772
Profit	38,041,850	39,354,185	40,605,731
SBR	1.4%	2.4%	2.5%
Adjusted Gross Profit	38,574,436	40,298,685	41,620,875
NPV	38,574,436	33,582,238	28,903,385
Cumulative NPV	38,574,436	72,156,674	101,060,059
CLV	127,730	238,929	334,636
Average Profit per Customer	127,730	114,225	100,709

Worst Case			
Cost	72,195,000	68,080,000	64,470,000
Profit	33,505,000	31,670,000	29,680,000
SBR	1 4%	2 4%	2 5%
Adjusted Gross Profit	33,974,070	32,430,080	30,422,000
NPV	33,974,070	27,025,067	21,126,389
Cumulative NPV	33,974,070	60,999,137	82,125,526
CLV	112,497	201,984	271,939
Average Profit per Customer	112,497	94,825	78,537

Customer LifeCycle Profitability Model Input Page 1

Client: XYZ Company

Strategy: Alternative #2

Scenario: Best Case

Revenue Last Year	Actual
Starting Customers	290
New Customers w/out Referral	10
New Customers w/ Referral	20
Total Customers	320
Ending Customers	270
Revenue	112,000,000
Profit Margin (Income before taxes/Revenue)	33%
Ave. Yearly Sale (Revenue/Total Customers)	350,000
Referral Rate* (New Customers w/ Referral/ Starting Customers)	7%
Retention Rate* (Ending Customers/Total Customers)	84%
Profit Adjustments	
Strategic Brand Readiness (SBR) Factor	1.4%
NPV (Net Present Value) Discount Rate	1.00

Forecast Year 1	Year 2	Year 3	Assumptions
270	268	269	
20	20	20	100% increase
22	25	25	
312	313	314	
268	269	270	
114,660,000	120,778,875	127,223,066	
35%	35%	36%	
367,500	385,875	405,169	Historic 5% growth
8%	8%	8%	Program improves it
86%	86%	86%	Program improves it
2.4%	2.5%		Improves
1.20	1.44		Default

*Rates used to forecast customers in next year.

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Customer LifeCycle Profitability Model Input Page 1

Client: XYZ Company
Strategy: Alternative #2 **Scenario: Worst Case**

Revenue Each Year	Actual	Forecast Year 1	Year 2	Year 3	Assumptions
Starting Customers	290	270	258	247	
New Customers w/out Referral	10	15	15	15	50% increase
New Customers w/ Referral	20	22	21	21	
Total Customers	320	307	294	283	
Ending Customers	270	258	247	238	
Revenue	112,000,000	107,450,000	102,900,000	99,050,000	
Profit Margin (Income before taxes/Revenue)	33%	32%	33%	32%	
Ave. Yearly Sale (Revenue/Total Customers)	350,000	350,000	350,000	350,000	Stabilizes
Referral Rate* (New Customers w/ Referral/ Starting Customers)	7%	7%	7%	7%	Stabilizes
Retention Rate* (Ending Customers/Total Customers)	84%	84%	84%	84%	Stabilizes
Profit Adjustments					
Strategic Brand Readiness (SBR) Factor		1.4%	2.4%	2.5%	Improves
NPV (Net Present Value) Discount Rate		1.00	1.20	1.44	Default

*Rates used to forecast customers in next year

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Customer LifeCycle Profitability Model Input Page 2

Client: XYZ Company

Strategy: Alternative #2 **Scenario: Best Case**

Costs	Variables	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent		**58%**	**58%**	**58%**	Less work w/automation
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral		177	177	177	
Contacts In Play w/ Referral		53	60	60	
Incremental Costs per Contact	1,500	345,000	355,500	355,500	Significantly less w/program
Total Fixed Costs		500,000	500,000	500,000	Upgrade mat., add promo campaigns
Cold to Qualified Lead Rate w/ out Referral		30%	30%	30%	Easier w/program
Cold to Qualified Lead Rate w/ Referral		75%	75%	75%	Easier w/program
Closing (initial)					
Contacts In Play w/ out Referral		53	53	53	
Contacts In Play w/ Referral		40	45	45	
Incremental Costs per Contact	12,000	1,116,000	1,176,000	1,176,000	Historic
Commission Costs	2%	308,700	347,288	364,652	Historic
Total Fixed Costs		100,000	100,000	100,000	Upgrade presentation
Qualified Lead to Initial Sale Rate w/ out Referral		38%	38%	38%	Easier w/program
Qualified Lead to Initial Sale Rate w/ Referral		55%	55%	55%	Easier w/program
Closing (Renewal)					
Percent Contracts Up for Renewal		15%	15%	15%	Historic
Contacts In Play		47	47	47	
Incremental Costs per Contact	12,000	564,000	564,000	564,000	Historic
Commission Costs	2%	294,000	308,700	324,135	Historic
Total Fixed Costs		100,000	100,000	100,000	Upgrade presentation
Potential Renewal to Renewal Sale Rate		86%	86%	86%	
Retention					
Contacts In Play		312	313	314	
Incremental Costs	10,000	3,120,000	3,130,000	3,140,000	Historic
Total Fixed Costs		400,000	400,000	400,000	Adds referral program
Investments					
Infrastructure					
Front Office		100,000	100,000	100,000	Adds more training
Back Office		300,000	-	-	Automates info flow
Brand Readiness					
Front Office		1,000,000	1,000,000	1,000,000	Adds influencer program
Back Office		75,000	75,000	75,000	Historic

Description

Back Office Costs: Cost of Goods/Services Sold, Overhead

Incremental Costs: Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan).

Fixed Costs: Preparation of tactics for implementation plus related ancilliary program costs

Infrastructure Investments: People, process, technology improvements in efficiency, capability.

Brand Readiness Investments. Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness

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Customer LifeCycle Profitability Model Input Page 2

Client: XYZ Company

Strategy: Alternative #2

Scenario: Worst Case

Costs	Variables	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent		60%	60%	60%	Kept in check w/automation
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral		215	215	215	
Contacts In Play w/ Referral		58	56	56	
Incremental Costs per Contact	1,500	409,500	406,500	406,500	Significantly less w/program
Total Fixed Costs		500,000	500,000	500,000	Upgrade mat., add promo campaigns
Cold to Qualified Lead Rate w/ out Referral		20%	20%	20%	Somewhat easier w/program
Cold to Qualified Lead Rate w/ Referral		72%	72%	72%	Somewhat easier w/program
Closing (Initial)					
Contacts In Play w/ out Referral		43	43	43	
Contacts In Play w/ Referral		42	40	40	
Incremental Costs per Contact	12,000	1,020,000	996,000	996,000	Historic
Commission Costs	2%	259,000	252,000	252,000	Historic
Total Fixed Costs		100,000	100,000	100,000	Upgrade presentation
Qualified Lead to Initial Sale Rate w/ out Referral		35%	35%	35%	Somewhat easier w/program
Qualified Lead to Initial Sale Rate w/ Referral		52%	52%	52%	Somewhat easier w/program
Closing (Renewal)					
Percent Contracts Up for Renewal		15%	15%	15%	Historic
Contacts In Play		46	44	42	
Incremental Costs per Contact	12,000	552,000	528,000	504,000	Historic
Commission Costs	2%	273,000	259,000	245,000	Historic
Total Fixed Costs		100,000	100,000	100,000	Upgrade presentation
Potential Renewal to Renewal Sale Rate		84%	84%	84%	
Retention					
Contacts In Play		307	294	283	
Incremental Costs	10,000	3,070,000	2,940,000	2,830,000	Historic
Total Fixed Costs		400,000	400,000	400,000	Adds referral program
Investments					
Infrastructure					
Front Office		100,000	100,000	100,000	Adds more training
Back Office		300,000	-	-	Automates info flow
Brand Readiness					
Front Office		1,000,000	1,000,000	1,000,000	Adds influencer program
Back Office		75,000	75,000	75,000	Historic

Description

Back Office Costs: Cost of Goods/Services Sold, Overhead.

Incremental Costs: Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan)

Fixed Costs: Preparation of tactics for implementation plus related ancillary program costs

Infrastructure Investments: People, process, technology improvements in efficiency, capability

Brand Readiness Investments: Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness.

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Customer LifeCycle Profitability Model Input Page 3

Client: XYZ Company
Strategy: Alternative #2

Best Case			
Cost	74,825,500	78,208,235	81,988,666
Profit	39,834,500	42,570,640	45,234,400
SBR	1.4%	2.4%	2.5%
Adjusted Gross Profit	40,392,183	43,592,335	46,365,260
NPV	40,392,183	36,326,946	32,198,097
Cumulative NPV	40,392,183	76,719,129	108,917,226
CLV	129,462	245,895	349,094
Average Profit per Customer	129,462	116,061	102,542

Worst Case			
Cost	72,628,500	69,396,500	66,938,500
Profit	34,821,500	33,503,500	32,111,500
SBR	1.4%	2.4%	2.5%
Adjusted Gross Profit	35,309,001	34,307,584	32,914,288
NPV	35,309,001	28,589,653	22,857,144
Cumulative NPV	35,309,001	63,898,654	86,755,798
CLV	115,013	208,139	282,592
Average Profit per Customer	115,013	97,244	80,767

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Produced with a Trial Version of

Customer LifeCycle Profitability Model

Alternative Strategies Scenario Comparison



Status Quo

KEY METRICS		Year 1	Year 2	Year 3
Strategic Brand Readiness	Best Case	1.4%	1.0%	0.6%
	Worst Case	1.4%	1.0%	0.6%
New Customers w/o Referral	Best Case	10	10	10
	Worst Case	10	10	10
Referral Rate	Best Case	7%	7%	7%
	Worst Case	6%	6%	6%
Retention Rate	Best Case	80%	80%	80%
	Worst Case	80%	76%	72%
Total Customers	Best Case	302	273	247
	Worst Case	302	270	231
Average Yearly Sale	Best Case	350,000	350,000	350,000
	Worst Case	333,000	317,000	302,000
Customer Lifetime Value	Best Case	118,544	206,732	272,466
	Worst Case	101,864	172,464	218,703

BOTTOM LINE	Revenue			Margin Rate			Money at Risk Year 1	Cumulative NPV Profit
Best Case	112,000,000	to	86,450,000	33%	to	33%	70,394,000	82,284,875
Worst Case	112,000,000	to	69,762,000	33%	to	29%	70,227,800	66,048,355

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Customer LifeCycle Profitability Model
Alternative Strategies Scenario Comparison



Alternative #1

KEY METRICS		Year 1	Year 2	Year 3
Strategic Brand Readiness	Best Case	1.4%	2.4%	2.5%
	Worst Case	1.4%	2.4%	2.5%
New Customers w/o Referral	Best Case	10	10	10
	Worst Case	10	10	10
Referral Rate	Best Case	8%	8%	8%
	Worst Case	7%	7%	7%
Retention Rate	Best Case	86%	86%	86%
	Worst Case	84%	84%	84%
Total Customers	Best Case	302	294	287
	Worst Case	302	285	269
Average Yearly Sale	Best Case	367,500	385,875	405,169
	Worst Case	350,000	350,000	350,000
Customer Lifetime Value	Best Case	127,730	238,929	334,636
	Worst Case	112,497	201,984	271,939

BOTTOM LINE	Revenue			Margin Rate			Money at Risk Year 1	Cumulative NPV Profit
Best Case	112,000,000	to	116,283,503	33%	to	35%	72,943,150	101,060,059
Worst Case	112,000,000	to	94,150,000	33%	to	32%	72,195,000	82,125,526

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Customer LifeCycle Profitability Model

Alternative Strategies Scenario Comparison



Alternative #2

KEY METRICS		Year 1	Year 2	Year 3
Strategic Brand Readiness	Best Case	1.4%	2.4%	2.5%
	Worst Case	1.4%	2.4%	2.5%
New Customers w/o Referral	Best Case	20	20	20
	Worst Case	15	15	15
Referral Rate	Best Case	8%	8%	8%
	Worst Case	7%	7%	7%
Retention Rate	Best Case	86%	86%	86%
	Worst Case	84%	84%	84%
Total Customers	Best Case	312	313	314
	Worst Case	307	294	283
Average Yearly Sale	Best Case	367,500	385,875	405,169
	Worst Case	350,000	350,000	350,000
Customer Lifetime Value	Best Case	129,462	245,895	349,094
	Worst Case	115,013	208,139	282,592

BOTTOM LINE	Revenue			Margin Rate			Money at Risk Year 1	Cumulative NPV Profit
Best Case	112,000,000	to	127,223,066	33%	to	35%	74,825,500	108,917,226
Worst Case	112,000,000	to	99,050,000	33%	to	32%	72,628,500	86,755,798

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Customer LifeCycle Profitability Model

Alternative Strategies Scenario Comparison



Status Quo

BOTTOM LINE	Revenue		Margin Rate		Money at Risk Year 1	Cumulative NPV Profit	Select One
Best Case	112,000,000 to	86,450,000	33% to	33%	70,394,000	82,284,875	x
Worst Case	112,000,000 to	69,762,000	33% to	29%	70,227,800	66,048,355	

Alternative #1

BOTTOM LINE	Revenue		Margin Rate		Money at Risk Year 1	Cumulative NPV Profit	Select One
Best Case	112,000,000 to	116,283,503	33% to	35%	72,943,150	101,060,059	
Worst Case	112,000,000 to	94,150,000	33% to	32%	72,195,000	82,125,526	x

Alternative #2

BOTTOM LINE	Revenue		Margin Rate		Money at Risk Year 1	Cumulative NPV Profit	Select One
Best Case	112,000,000 to	127,223,066	33% to	35%	74,825,500	108,917,226	
Worst Case	112,000,000 to	99,050,000	33% to	32%	72,628,500	86,755,798	x

Customer LifeCycle Profitability Model
Alternative Strategies Comparison



KEY METRICS		Year 1	Year 2	Year 3
Strategic Brand Readiness	Status Quo	1.4%	1.0%	0.6%
	Alternative #1	1.4%	2.4%	2.5%
	Alternative #2	1.4%	2.4%	2.5%
New Customers w/o Referral	Status Quo	10	10	10
	Alternative #1	10	10	10
	Alternative #2	15	15	15
Referral Rate	Status Quo	7%	7%	7%
	Alternative #1	7%	7%	7%
	Alternative #2	7%	7%	7%
Retention Rate	Status Quo	80%	80%	80%
	Alternative #1	84%	84%	84%
	Alternative #2	84%	84%	84%
Total Customers	Status Quo	302	273	247
	Alternative #1	302	285	269
	Alternative #2	307	294	283
Average Yearly Sale	Status Quo	350,000	350,000	350,000
	Alternative #1	350,000	350,000	350,000
	Alternative #2	350,000	350,000	350,000
Customer Lifetime Value	Status Quo	118,544	206,732	272,466
	Alternative #1	112,497	201,984	271,939
	Alternative #2	115,013	208,139	282,592

BOTTOM LINE	Revenue			Margin Rate			Money at Risk Year 1	Cumulative NPV Profit
Status Quo	112,000,000	to	86,450,000	33%	to	33%	70,394,000	82,284,875
Alternative #1	112,000,000	to	94,150,000	33%	to	32%	72,195,000	82,125,526
Alternative #2	112,000,000	to	99,050,000	33%	to	32%	72,628,500	86,755,798

APPENDIX - E

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Strategic Brand Readiness (SBR) Factor Template:

The template allows managers to quantify risk by rating relative market position and anticipating what is likely to occur in the next two years to change the situation. Used for Status Quo, the template scores the present conditions. Used to Plan a new Marketing Strategy, it anticipates changes in the situation expected. Extrapolated from the results of an implemented strategy, it calibrates risk and leads to greater understanding of the relative market position.

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Strategic Brand Readiness (SBR) Factor Template



Strategy _____ Completed by _____

Internal Focus Categories	Five Scoring Choices	YEAR	YEAR	YEAR	YEAR	YEAR
OPPORTUNITY						
Customer Need		Riding a Wave	Commodity	Create Market	Wishful	Unknown
Market Size		Large	Medium	Small	Have to Make It	Unknown
Market Maturity		Growing	Emerging	Stable	Shrinking	Unknown
Competition		None	Slight	A Lot	Fierce	Unknown
Window of Opportunity		Easy	Doable	Unknown	Narrow	Too Wide
Sales Cycle		Short	Medium	Long	Unknown	Too Long
Limitations/Restrictions		None	Some	Many	Severe	Unknown
Access To Capital		Ready	Some Work	Unknown	Hard to Get	Nonexistent
Capacity		Plenty	Some	Oversupply	None	Unknown
SWING						
Customer Expectations Shift		Positive	Neutral	Negative	Unclear	Unknown
Innovation		Steady Flow	Proven	Leading Edge	Too Late	None
Economic Conditions		Boom	Cooking	Stable	Tight	Depressed
MUST HAVES						
Quality		Excellent	Good	Poor	Questionable	Unknown
Value for Price		Terrific	Acceptable	Okay	Marginal	Unknown
Commitment		Serious	Somewhat	So-So	Unknown	Nonexistent
Track Record		Totally Relevant	Somewhat Relevant	By Association	Related	None
Trust Worthy		Absolute	Probable	Untested	Questionable	No Way
Information Flow		Readily Available	Open	Upon Request	Tight	Secretive
Easy to Buy/Renew		Piece of Cake	No Problem	Relatively Easy	Takes Work	Like Pulling Teeth
MOMENTUM						
Brand Equity		Sought After	Established	Arrived	Toe Hold	Ignored
Market Share		Market Leader	Top Ten	In the Pack	Bottom Feeder	None
Customer Share		Maxed Out	Lots of Room	Tiny	Just Starting	None
# of Products/Services		Multiple, Proven	Few Proven	Only One Proven	Few Unproven	Only One, Unproven
BUZZ						
Reputation		Excellent	Good	Fair	Poor	Unknown
Credibility		Tons	Decent	By Association	Unknown	None
Receptivity		Eager	Open	Neutral	Unknown	Closed
Awareness		Considering	Knowledgeable	Aware	Aided Aware	Unaware
Satisfaction		Partners	Preference	Loyal	Likes	Unhappy
DIFFICULTY						
Opening		First to Market	What Already Believes	Don't Know Much	Must Change Minds	Take On Others
Difficulty of Action		Existing to Existing	New to Existing	Existing to New	New to New	Totally New Approach
Alternatives		None	Questionable	A Few	Unknown	Tons
Switching Costs/Acquisition		No Problem	Possible	Hassle	Exposure	Integral to Business
Switching Costs/Retention		Integral to Business	Expensive	Hassle	Possible	No Problem
Audience Sophistication		Wants to Believe	Top Level View	Savvy	Questioning Role	Unknown
Difficulty to Reach		Concentrated	Several Pockets	Fragmented	Unclear	Unknown
Audience Resistance		None	Slight	Unknown	Fierce	Inertia
Communication Path		Direct to User	Via Internal Influencers	Unknown	Mediated by Channel	Influenced by Media

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Strategic Brand Readiness (SBR) Factor Template CONTINUED



Internal Focus Categories	Five Scoring Choices				
RELATIONSHIPS	YEAR	YEAR	YEAR	YEAR	YEAR
Strengths Of	Steller	Solid	Workable	Marginal	Unclear
Amount Of	Vast Network	Key Network	Key Players	Some Players	None
Length Of	Long Term	Comfortable	A While	Relatively New	Nonexistent
PROMISE	YEAR	YEAR	YEAR	YEAR	YEAR
Differentiation	Clear	So-So	Competition Has It	Fuzzy	Unknown
Value Proposition	In Tune w/ Customer Appeal	Understood	Needs Educating	On Another Planet	Unknown
Offer Appeal	Speaks to Customer	Attractive	Exists	Not Important	Unknown
Positioning	Hits Appeal & Value Prop	Hits Appeal	Hits Value Proposition	Misses the Mark Totally	Unknown
Messages	Believable	Acceptable	Convoluted	Unbelievable	Unknown
Image	Consistent/Appropriate	Consistent	Appropriate	Out of Touch	Unknown
Supporting Facts	Great Back Up	Reasonable	Stretching It	Questionable	Smoke 'n' Mirrors
Content Complexity	KISS	8th Grade	High School	College	PhD
Content Depth	Enough to Convince	Enough to Act	Thin	Too Much	Unknown
DELIVERY	YEAR	YEAR	YEAR	YEAR	YEAR
Overall Contact	Take Ownership	Helpful	Approachable	It's a Job	Disgruntled
Sales Process	Enjoyable	Smooth	Okay	Pressured	Unknown
Fulfillment	Exceeds Expectations	As Promised	No Fanfare	Haphazard	Takes Forever
Use of Products/Services	Hassle-free	Reliable	So-So	A Pain	Unknown
Cust Service/Tech Support	Authority to Make Right	Superior	Responsive	Accessible	Couldn't Care
Community	Integral	Acceptable	Hit or Miss	Poorly Executed	Nonexistent
INTERACTION	YEAR	YEAR	YEAR	YEAR	YEAR
Exchange	Easy, Welcome	Encouraged	Okay	Put Up With It	Cut Off
Listening	Built In	Extra Mile	Occasional	Lip Service	Nonexistent
Follow Through	Unbelievable	Acts On Feedback	Reliable	Inconsistent	Forget It
TLC	Authentic	Flowing	Now and Then	Forced	What's This
Recognition	In Every Way	Special Treatment	Once in a While	Never	No Way
SUFFICIENT RESOURCES	YEAR	YEAR	YEAR	YEAR	YEAR
Time Spent	Enough to Leverage	Good Penetration	Adequate for 1st Round	A Little Short	Not Enough
Money Available	Plenty	Adequate	Compromised	Just Barely Enough	Too Little
Program Quality	Classic	Staying Power	Sticky	Short Termer	One Shot
People Expertise	Pros	Fit for Task	Average	Stretching It	Asking Too Much
Process	Closed Loop	Integrated	Some Coordination	Silos Only	Nonexistent
Technology	Personally Empowering	High Tech, Tech Touch	Advanced Automation	Some Automation	Behind
SYNERGY	YEAR	YEAR	YEAR	YEAR	YEAR
Campaign	Leverage	Integrated	Neutral	Helter Skelter	Opposing
Channel	Seamless	Complementary	Open	Disarray	In Conflict
Product/Service	Active Up Sell / Cross Sell	Customer Migration Path	Passive Up Sell / Cross Sell	Unknown	Disparate
Team	Breakthrough Results	Flawless Execution	Works Well	Don't Talk	Dysfunctional

Instructions First Score Year 1 Make an additional score for year 2 and Year 3 only if they will change from Year 1

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Customer LifeCycle Profitability Model Input Template:

The template gathers historical data and elicits assumptions necessary to anticipate long-term profitability over customers' entire lifecycle. Used for Status Quo, it forecasts future profits given the present conditions. Used to evaluate Alternative Marketing Strategies, it anticipates profits expected from a new strategy. As a tool to measure the implemented strategy, it forecasts future profits from customers brought to the business by the new Marketing Strategy.

Customer LifeCycle Profitability Model Input Template - Page 1

Client: _____

Strategy _____ **Scenario** _____



Prior Year	Actual
Starting Customers	
New Customers w/out Referral	
New Customers w/ Referral	
Total Customers	
Ending Customers	
Revenue	
Margin Rate (Income before taxes/Revenue)	
Ave. Yearly Sale (Revenue/Total Customers)	
Referral Rate* (New Customers w/ Referral/ Starting Customers)	
Retention Rate* (Ending Customers/Total Customers)	
Profit Adjustments Strategic Brand Readiness (SBR) Factor NPV (Net Present Value) Discount Rate	

*Rates used to forecast customers in next year

Forecast			Assumptions
Year 1	Year 2	Year 3	
1.00	1.20	1.44	Default

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Customer LifeCycle Profitability Model Input Template - Page 2

Client:

Strategy: **Scenario**

Costs	Variables	Forecast Year 1	Forecast Year 2	Forecast Year 3	Assumptions
Back Office Cost Percent					
Front Office Direct Costs					
Acquisition					
Contacts In Play w/ out Referral					
Contacts In Play w/ Referral					
Incremental Costs	/contact				
Fixed Costs					
Cold to Qualified Lead Rate w/ out Referral					
Cold to Qualified Lead Rate w/ Referral					
Closing (initial)					
Contacts In Play w/ out Referral					
Contacts In Play w/ Referral					
Incremental Costs	/contact				
Total Commission Costs	%				
Fixed Costs					
Qualified Lead to Initial Sale Rate w/ out Referral					
Qualified Lead to Initial Sale Rate w/ Referral					
Closing (Renewal)					
Percent Contracts Up for Renewal					
Contacts In Play					
Incremental Costs	/contact				
Total Commission Costs	%				
Fixed Costs					
Potential Renewal to Renewal Sale Rate					
Retention					
Contacts In Play					
Incremental Costs	/contact				
Fixed Costs					
Investments					
Infrastructure					
Front Office					
Back Office					
Brand Readiness					
Front Office					
Back Office					

Description

Back Office Costs. Cost of Goods/Services Sold, Overhead.

Incremental Costs Cost of the activities or interactions that implement the IMAP (Integrated Market Action Plan).

Fixed Costs Preparation of tactics for implementation plus related ancillary program costs.

Infrastructure Investments: People, process, technology improvements in efficiency, capability.

Brand Readiness Investments Improvements in the selling environment, in what's promised and in what's delivered to increase market effectiveness

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Interaction ROI (I ROI) Template:

The template gathers historical data and elicits assumptions necessary to paint a detailed number picture of how the marketing process works. It can be used to refine the new Marketing Strategy, anticipating what the metrics will be. As a tool to summarize performance of the implemented strategy to plan, it provides insight into contact behavior and areas for adjustments.

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Interaction ROI (I ROI)
Input Template

Client: _____ **Scenario:** _____ **Period:** _____

Strategy: _____

CEL Level	Starting Contacts* COMPLETE	+ Added** Contacts = FORECAST	Contacts in Play COMPUTE	Campaign Investment FORECAST	Total Incremental Costs FORECAST	Ave. # Interactions FORECAST	Assumptions
0 Out of Play							
C4 Hot							
C5 Hotter							
C6 Closed Sale							
R13 Unhappy							

* These are contacts the business is already in relationship with when this period begins.

** New contacts can be added to any CEL Level; new campaigns begin at A1. With the exceptions of Added Contacts in CEL Level 0 and R13, generally contacts progress from A1 to R12.

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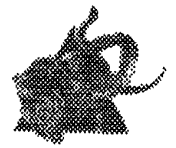
Strategic Brand Readiness (SBR) Summary Report:

The report allows managers to see at a glance their perceptions of the changing risk facing the business and where attention is needed to be market ready in Acquisition/ Closing/ Retention Phases. It compares the SBR Factor for Status Quo, Planned (based on New Marketing Strategy), and Actual (based on New Marketing Strategy) for Year One, Year Two and Year Three. The SBR Factor is used to score a business' relative market position and to quantify the risk posed by external and internal brand readiness issues. The SBR Factor is then used in financial projections to modify the risk.

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Strategic Brand Readiness (SBR) Summary Report



PHASE ALLOCATION	Max %	STATUS QUO Year 1	STATUS QUO Year 2	STATUS QUO Year 3	PLANNED Year 1	PLANNED Year 2	PLANNED Year 3	ACTUAL Year 1	ACTUAL Year 2	ACTUAL Year 3
Acquisition	±2									
Closing	±3									
Retention	±5									
SBR FACTOR	±10									

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Customer LifeCycle Profitability Model
Alternative Strategies Comparison:

The report gives management the information needed to stay with the Status Quo or change to a more suitable Alternative Marketing Strategy. It summarizes key assumptions leading to forecast. It compares anticipated long-term profitability of an individual customer and the business overall, adjusted to reflect the risk and the value of future dollars, and shows what financial commitment is required to get started with each option.

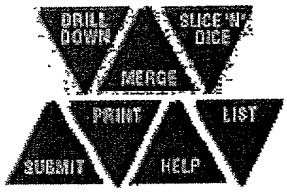
Customer LifeCycle Profitability Model
Alternative Strategies Comparison



KEY METRICS		Year 1	Year 2	Year 3
Strategic Brand Readiness (SBR) Factor	Status Quo			
	Alternative #1			
	Alternative #2			
New Customers w/o Referral	Status Quo			
	Alternative #1			
	Alternative #2			
Referral Rate	Status Quo			
	Alternative #1			
	Alternative #2			
Retention Rate	Status Quo			
	Alternative #1			
	Alternative #2			
Total Customers	Status Quo			
	Alternative #1			
	Alternative #2			
Average Yearly Sale	Status Quo			
	Alternative #1			
	Alternative #2			
Customer Lifetime Value	Status Quo			
	Alternative #1			
	Alternative #2			

BOTTOM LINE	Revenue Growth	Margin Rate	Money at Risk Year 1	Cumulative NPV Profit
Status Quo	to	to		
Alternative #1	to	to		
Alternative #2	to	to		

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Customer LifeCycle Profitability Model Summary Report

The report provides information to evaluate the success the implemented Marketing Strategy compared to Plan and Status Quo. It summarizes key assumptions leading to forecast. It compares anticipated long-term profitability of an individual customer and the business overall, adjusted to reflect the risk and the value of future dollars, and the cost in terms of up front financial commitment.



Customer LifeCycle Profitability Model Summary Report



KEY METRICS		Year 1	Year 2	Year 3
Strategic Brand Readiness (SBR) Factor	Status Quo			
	Planned			
	Actual			
New Customers w/o Referral	Status Quo			
	Planned			
	Actual			
Referral Rate	Status Quo			
	Planned			
	Actual			
Retention Rate	Status Quo			
	Planned			
	Actual			
Total Customers	Status Quo			
	Planned			
	Actual			
Average Yearly Sale	Status Quo			
	Planned			
	Actual			
Customer Lifetime Value	Status Quo			
	Planned			
	Actual			

BOTTOM LINE	Revenue Growth	Margin Rate	Money at Risk Year 1	Cumulative NPV Profit
Status Quo	to	to		
Planned	to	to		
Actual	to	to		

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Interaction ROI (I ROI) Summary Report - Phase Level Process:

Management can see at a glance where contacts are in the pipeline and the Actual costs of marketing to the individual contact in each Acquisition/ Closing/ Retention (A/C/R) Phase as compared to Plan. The breakdown into A/C/R Phases allows management to make informed, focused short-term adjustments.

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Interaction ROI (I ROI) Summary Report
Phase Level Process

PLANNED (Dynamic View)	Total Incremental Costs	Total Fixed Costs	Incremental ROI 1	Marginal 2 ROI 1	Contacts In Play
Acquisition					
Closing (Initial)					
Closing (Renewal)					
Retention					

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ACTUAL (Dynamic View)	Total Incremental Costs	Total Fixed Costs	Incremental ROI 1	Marginal 2 ROI 1	Contacts In Play
Acquisition					
Closing (Initial)					
Closing (Renewal)					
Retention					

1 = Costs / # of Contacts In Play

2 = Marginal Uses Total Direct Costs

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Interaction ROI (I ROI) Summary Report - Phase Level Events:

The report shows how well the Marketing Strategy is working, compared to Plan, to move contacts from one major event or milestone to another through the Acquisition/ Closing/ Retention (A/C/R) Phases. The breakdown into A/C/R Phases allows management to make informed, focused short-term adjustments.

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Interaction ROI (I ROI) Summary Report
Phase Level Events

PLANNED (Dynamic View)	Conversion Rates	Contacts Converted	Incremental ROI 1	Marginal 2 ROI 1
Cold to Qualified Lead				
Qualified to Initial Sale				
Cold to Initial Sale				
[redacted]				
Retained to Potential Renewal				
Potential Renewal to Renewal Sale				
Retained Customer				

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ACTUAL (Dynamic View)	Conversion Rates	Contacts Converted	Incremental ROI 1	Marginal 2 ROI 1
Cold to Qualified Lead				
Qualified to Initial Sale				
Cold to Initial Sale				
[redacted]				
Retained to Potential Renewal				
Potential Renewal to Renewal Sale				
Retained Customer				

1 = Costs / # of Contacts Converted

2 = Marginal Uses Total Direct Costs

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Interaction ROI (I ROI) Summary Report - CEL Level Process:

The report gives a finer cut at where contacts are in the pipeline and the Actual costs to market to the individual contact in each CEL as compared to Plan. With the CEL breakdown management can fine tune the process on the fly.

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Interaction ROI (I ROI) Summary Report
CEL Level Process



PLANNED (Static View)	Conversion Rate	Retention Rate	Ave # Interactions	Ave CEL #	Ave. Incremental Costs 5	Incremental ROI 6	Contacts in Play
0 Out of Play							
A1 Cold							
A2 Cool							
A3 Warm							
C4 Hot							
C5 Hotter							
C6 Closed							
R7 Expectant							
R8 Trial							
R9 Like							
R10 Loyal							
R11 Prefer							
R12 Partner*							
R13 Unhappy *							

5 = Total Incremetntal Costs / Contacts In Play
6 = Total Incremental Costs / Contacts Converted (or Unchanged) *

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Interaction ROI (I ROI) Summary Report
CEL Level Process



ACTUAL (Static View)	Conversion Rate	Retention Rate	Ave # Interactions	Ave CEL #	Ave. Incremental Costs 5	Incremental ROI 6	Contacts In Play
0 Out of Play							
A1 Cold							
A2 Cool							
A3 Warm							
C4 Hot							
C5 Hotter							
C6 Closed							
R7 Expectant							
R8 Trial							
R9 Like							
R10 Loyal							
R11 Prefer							
R12 Partner*							
R13 Unhappy *							

5 = Total Incremetntal Costs / Contacts In Play

6 = Total Incremental Costs / Contacts Converted (or Unchanged) *

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DRILL DOWN | SLICE 'N' DICE | MERGE | PRINT | LIST | SUBMIT | HELP

REPORTS

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility

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Interaction ROI (I ROI) Summary Report - CEL Level Event:

The report shows how well the Marketing Strategy is working compared to Plan. The report provides the facts based on major events or milestones in the CELs. It allows management to see at a glance the level of Interactions stimulating events and at what CEL events are more likely to occur. With the CEL breakdown management can fine tune the process on the fly.

HOME | BACK | NEXT | END | TOP

Interaction ROI (I ROI) Summary Report
CEL Level Events



ACTUAL (Dynamic View)	Start Closing Initial	Ave # Interactions	Ave CEL #	Start Closing Renewal	Ave # Interactions	Ave CEL #	Becomes Unhappy	Ave # of Interaction	Ave CEL #	Goes to Out of Play	Ave # Interaction	Ave CEL #
0 Out of Play												
A1 Cold												
A2 Cool												
A3 Warm												
C4 Hot												
C5 Hotter												
C6 Closed												
R7 Expectant												
R8 Trial												
R9 Like												
R10 Loyal												
R11 Prefer												
R12 Partner												
R13 Unhappy												

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Interaction ROI (I ROI) Summary Report
CEL Level Events



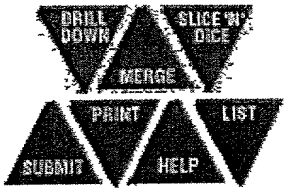
ACTUAL CONTINUED (Dynamic View)	Gives Referal	Ave # Interactions	Ave CEL #	Gives Reference	Ave # Interactions	Ave CEL #	Gives Testimonial	Ave # of Interactions	Ave CEL #	Increases Purchase	Ave # Interactions	Ave CEL #
0 Out of Play												
A1 Cold												
A2 Cool												
A3 Warm												
C4 Hot												
C5 Hotter												
C6 Closed												
R7 Expectant												
R8 Trial												
R9 Like												
R10 Loyal												
R11 Prefer												
R12 Partner												
R13 Unhappy												

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REPORTS

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility



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Individual Interaction ROI (I ROI) Report:

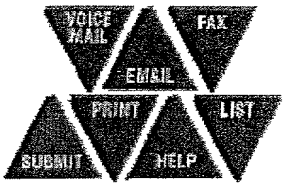
The report allows management to see the path through the CELs that an individual contact has taken and at what cost. The report is found on each contact's Relationship Value Knowledge Screen.



XYZ COMPANY

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KNOWLEDGE SCREEN RELATIONSHIP VALUE

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility



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Customer Lifetime Value (CLV)	
Potential (three years)	$282,592
Net Contribution (to date)	
Difference	
Revenue Potential Rating	
Up Sell	
Cross Sell	
Increase Volume	
Buzz Influence	
# Referrals	
# References	
# Testimonials	
Influencer Rating	
External	4
Internal	
Acquisition Value	
Put on Email List	Yes
Check Back Later	
Closing Value	
Priority	5
Closing Status	this month
Retention Value	
Priority	
Retention Status	
Customer Maintenance Level	

Individual Interaction ROI (I ROI) Report

Date Left CEL	# Interactions per CEL	Ending CEL#	Incremental $ Per CEL
	1	6.000 Closed Sale	50.00
2/26/01	6	5.535 Hotter	909.00
2/4/01	15	4.999 Hot	1559.00
12/20/00	2	2.080 Cool	20.00
12/19/00	5	1.150 Cold	10.00



EXHIBIT 5 PAGE 5 OF 5

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REPORTS

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
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DO NOT REMOVE

Interaction ROI (I ROI) Model Report:

The report aggregates the data stream of all movements (forward and backward) each contact makes in the CELs to show the movement patterns typical contacts make. Data can be segmented to capture the patterns of top priority customers. With this knowledge, management can build systems to encourage profitable behavior.



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XYZ COMPANY

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REPORTS

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- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility

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Individual Correlation with Awareness / Satisfaction Research:

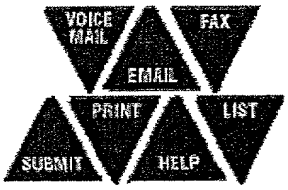
The report allows managers to see what individual contacts do at the CEL Level compared to what they say when questioned in Awareness/ Satisfaction Research studies. As a result, the process can be paced to match or validate what the contact says he/she might do. The report is found on each contact's Business Intelligence Knowledge Screen.

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KNOWLEDGE SCREEN BUSINESS INTELLIGENCE

Interaction
Priority Action
Search Contact
Add Contact
Add Relationship
Reports
Utility

Select Contact Information | Select Profiling Questions | Select Knowledge Screening

Choose From | Choose From | Choose From

Acquisition

Date	Saw Marketing Materials	Awareness Level
12/2/00	Yes	Aided Aware

Closing

Date	Feedback Notes	Awareness Level

Retention

Date	Survey Notes	Satisfaction Level	Modified CEL Level



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Targeting Research Commentary	
Independent study 8/12/00 tested potential for XYZ Company. XYZ relatively unknown, but critical need found with companies that have more than 150 gizmos and over $100 million in revenue.	
Awareness:	Unaware

Tracking Research Commentary	
Independent study12/27/00 rated XYZ Company against its competitors. XYZ being considered more frequently than ABC Company by a ratio of 10:1.	
Awareness:	Consideration

Competition
ABC Company

EXHIBIT 3 PAGE 5 OF 5

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Individual Correlation With Awareness/Satisfaction Research

Date	Awareness Level	Satisfaction Level	Existing CEL Level	Modified CEL Level
08/12/00	Unaware		0.000	
12/19/00	Aided Aware		2.040	
12/27/00	Consideration		4.000	



EXHIBIT 4-0055

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- Add Relationship
- Reports
- Utility

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Correlation with Awareness / Satisfaction Research Model Report:

Aggregating the comparative data from all contacts, the model shows the patterns of what typical contacts do at the CEL Level compared to what they say when questioned in Awareness/ Satisfaction Research studies. The data can be segmented to capture the patterns of the top priority customers. With this knowledge, management can improve forecasts of future profits.

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exhibit 94 - 01/29/02

XYZ COMPANY

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- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility

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Exhibit 4 Deposition

Deposition of Contacts Summary Report - By Phase Level:

Management receives an early warning on the status of the Acquisition/ Closing/ Retention Phase pipeline with this report.

BACK | END | HOME | NEXT | TOP

20020T0* 8hT9900T

Desposition of Contacts Summary Report By Phase Level

ACTUAL	Start	In Play	Current
Out of Play			
Acquisition			
Closing Initial			
Retention			
Closing Renewal			
Total			

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- Priority Action
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- Add Contact
- Add Relationship
- Reports
- Utility

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Deposition of Contacts Summary Report - By Status:

The report alerts management to the number of contacts in a business who may be influencing acceptance or success and who may be additional potential customers.

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Exhibit 4 - 04/26/04

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Desposition of Contacts Summary Report By Status



ACTUAL	# of Business	# of Contacts	Ave # of Contacts
Customer			
Prospect			

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REPORTS

- Interaction
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- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility

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Deposition of Contacts Summary Report - By Origination:

Management receives guidance on how to use tactics by relating milestones to the source of the contact with this report.

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EXHIBIT 64 - 01/29/02

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20020 8,199007

Desposition of Contacts Summary Report By Origination



ACTUAL	# Aware	# Check Back Later	# Put on Email List	# Appointments	# Proposals
List A					
List B					
List C					
Promo: Direct Mail					
Telemarketing					
Email					
Website					
Sales Kit					
Publicity					
Event					
Extraordinary Event					
Overall					

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ACTUAL CONTINUED	# Customers	# Contract Rev > $X	# Gizmos > X	# Net Cont. > CLV	# Renewals
List A					
List B					
List C					
Promo: Direct Mail					
Telemarketing					
Email					
Website					
Sales Kit					
Publicity					
Event					
Extraordinary Event					
Overall					

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20020708T99007

Top Priority Customers Profile Report Characteristics



IMMEDIACY	#	FINANCIAL	#	INFLUENCE	#
Gizmo Importance >4		Contract Revenue >$X		Giving Referrals	
Closing Priority >4		Net Contribution >CLV		Giving References	
Closing Status This Month		Up Sell Potential >4		Giving Testimonials	
Unhappy		Cross Sell Potential >4		Retention Priority >4	
Retention Status Uncertain		Increase Revenue >4		CEL 10, 11, 12	

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1h-E

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REPORTS

- Interaction
- Priority Action
- Search Contact
- Add Contact
- Add Relationship
- Reports
- Utility

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Top Priority Customers Profile Report - Attributes:

The report describes attributes of top priority customers that can be replicated in commonly available databases, leading management to contacts outside the business who may become top priority customers.

Segmented by the Characteristics of top priority customers, the report paints a picture of what the most likely top priority customer looks like as compared to Status Quo and Plan.

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Exhibit 43 - 05-1-00202

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20020TO" 8hT990OT

Top Priority Customers Profile Report Attributes



Strategy: _____ Completed By: _____

PRODUCTS	Product A	Product B	Product C	Product D	Product E
Company Attributes Geography					
Industry Type					
Size of Business					
Type of Business					
Revenue					
Employees					
Individual Attributes Job Title					
Experience Level					
Age					
Gender					
Embracing Attitude*					
If, yes...					
Overcoming Attitude*					
If, yes...					

*Yes/No/NA If yes, explain briefly.

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Ex-3

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Report Grid

Templates and Reports	Use In Establishing Metrics			Contribute to Purpose	Contribute to Benefit
	Status Quo	Plan	Actual		
Strategic Brand Readiness (SBR) Factor Template	X	X	X	1, 2	1, 4, 17, 18, 20, 24, 25
Customer LifeCycle Profitability Model Template	X	X	X	3, 4, 5, 10	1, 2, 4, 15, 17, 18, 19, 20, 24, 25
Interaction ROI (I ROI) Template		X	X	3, 6, 8, 9, 10	1, 2, 3, 8, 9, 15, 17,18,19,20,24, 25
Strategic Brand Readiness (SBR) Summary Report	X	X	X	1, 2	1, 4, 17, 18, 20, 24, 25
Customer LifeCycle Profitability Model Alternative Strategies Comparison	X	X		3, 4, 5, 10	1, 2, 4, 9, 15, 17, 18, 19, 20, 24, 25
Customer LifeCycle Profitability Model Summary Report	X	X	X	3, 4, 10, 11	1, 2, 4, 10, 15, 17, 18, 19, 20, 24, 25
Interaction ROI (I ROI) Summary Reports					
Phase Level Process		X	X	3, 4, 6, 8, 9	1, 3, 8, 15, 17, 18, 19, 20, 24, 25
Phase Level Events		X	X	3, 4, 6, 8, 9, 10	1, 3, 8, 15, 17, 18, 19, 20, 24, 25
CEL Level Process		X	X	3, 6, 7, 8, 9, 10	1, 3, 8, 15, 17, 18, 19, 20, 24, 25
CEL Level Events			X	3, 7, 8, 11, 13, 16, 19	1, 3, 6, 12, 13, 15, 16, 17, 18, 19, 20, 24, 25
Individual Interaction ROI (I ROI) Report			X	7, 8, 9	1, 3, 8, 15, 17, 18, 19, 20, 24, 25
Interaction ROI (I ROI) Model Report			X	7, 8, 13, 16, 19	1, 6, 12, 13, 15, 16, 17, 18, 19, 20, 24, 25

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Individual Correlation with Awareness/Satisfaction Research			X	7, 8, 17	1, 3, 15, 17, 18, 19, 20, 21, 22, 24, 25
Correlation with Awareness/Satisfaction Research Model Report			X	7, 8, 13, 16	1, 13, 15, 16, 17, 18, 19, 20, 21, 24, 25
Deposition of Contacts Summary Reports					
By Phase Level			X	18	3, 17, 18, 20, 24, 25
By Status			X	18	3, 17, 18, 20, 24, 25
By Origination			X	19	3, 7, 11, 17, 18, 20, 24, 25
Top Priority Customers Profile Reports					
Characteristics			X	4, 7, 8, 14, 19	1, 3, 5, 14, 15, 17, 18, 19, 20, 23, 24, 25
Attributes	X	X	X	15, 19	1, 5, 14, 15, 17, 18, 19, 20, 23, 24, 25

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20020T 8h59007

Purpose

1. Score a business's relative market position.
2. Modify risk in financial projections.
3. Quantify Front Office strategy and relationship performance effectiveness.
4. Integrate data from the Front and Back Office.
5. Compare alternative marketing strategies.
6. Refine assumptions and costs.
7. Compare disparate tactics numerically.
8. Place a value on Interactions.
9. Understand incremental costs.
10. Calculate conversion rates.
11. Evaluate the success of the chosen strategy compared to plan and status quo.
12. Examine cause and effect of Interactions on customer life cycle milestones.
13. Model customer movement/behavior patterns.
14. Chose database segmentation or aggregation criteria—unique to the business.
15. Chose database segmentation or aggregation criteria—to replicate in the target market.
16. Receive insight on customer behavior.
17. Receive insight on what the contact is likely to do.
18. Manage the Marketing, Sales—and Customer Care pipelines.
19. Replicate success.

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Benefit

1. Improve forecasts of future profits with more detailed, reliable information.
2. Increase long-term profitability by making better strategic choices.
3. Improve short-term performance by reacting fast to changing conditions.
4. Mitigate risk better by quantifying it and balancing it against the possible return.
5. Determine who the most profitable customers are.
6. Replace higher cost Interactions with equally effective lower cost ones.
7. Understand how marketing works tactically.
8. Understand what marketing costs--its incremental as well as fixed costs.
9. Choose the most promising strategy before investing in implementing it.
10. Compare how well a strategy is working compared to plan.
11. Determine which tactics are doing a good job.
12. Improve process management.
13. Improve systems that encourage profitable behavior.
14. Understand how top priority customers relationships work to duplicate them.
15. Put a value on the relationships important to success.
16. Differentiate in a way that can't be copied by competitors.
17. Know where to focus. *
18. Set realistic expectations. *
19. Hold Marketing, Sales and Customer Care accountable.
20. Hone the business model to maximize profits. *
21. Understand the value proposition: why customers buy, why they repurchase.
22. Pace process to match or validate what the contacts might do.
23. Improve data mining results.
24. Better use of resources.*
25. Informed decisions.*

* Common to all templates and reports.

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Analysis for Management
XYZ Company Example

Overview: XYZ Company had an innovative idea for delivery of gizmo management. It parlayed a successful business in one location into 10 offices around the country. Ahead of its time, it had little competition in the customer segments (industries in this case) most in need of its services and XYZ Company could achieve very attractive margin rates by a bare bones approach to marketing and relationship building.

Times have changed. The low hanging fruit, the customers most easily attained, has been picked. And the competition which has emerged is trying to take those customers away from XYZ Company. It may be hard for the competition to do that since XYZ Company has high satisfaction ratings with its customers and above average retention rates. But even though the average sale has increased by 5% each year historically, the company is not adding as many new customers as it once was. In fact, its customer base, or market share, is shrinking. And the economic conditions have leveled out. Where before XYZ Company's customers were growing themselves, now they are cutting back and have less need for gizmo management.

Despite these changes in the marketplace, XYC Company has as its business objectives to maintain its margin and continue to grow its business.

Approach: Using the Marketing Business System (MBS), management is seeking to improve its business intelligence, mitigate risks and maximize profit flows.

1. A Strategic Brand Readiness (SBR) Factor for status quo was calculated as a diagnostic. While the SBR Factor showed the risk as a positive 1.4% in year one, by year three management anticipated it would decline to 0.6%. No surprise that the greatest weakness was in Acquisition and the greatest expected decline was in Retention.

2. Similarly, when the status quo Customer LifeCycle Profitability Model was run, the revenue in best and worst case declined as management feared. In a worst case scenario where further slippage across the board was anticipated, revenue dipped drastically from $112,000,000 to $69,762,000 while margins went from 33% to 29%. The difference between best and worst case anticipated Cumulative NPV Profit was more than $16,000,000.

3. To understand what was happening better, management commissioned a targeting research study which indicated some vulnerability in its customer base. There was dissatisfaction with the amount of information XYZ Company management provides their customers about their gizmos. Additionally, the people who buy are not the

people who use the service so XYZ Company doesn't have as much visibility in their customers' companies with those in influence.

4. The study also tested potential for XYZ Company in other customer segments in the target market and found a critical need with companies that have more than 150 gizmos and over $100 million in revenue.

5. XYZ Company had been following a sales driven marketing model where the sales force were responsible for all the marketing effort. An analysis of the Front Office process suggested that XYZ Company should consider switching responsibility for Retention to those responsible for providing the service and that a program asking for referrals should be put in place. Another influencer program to increase Brand Readiness was also up for consideration. And an investment to automate information flow was on the table so XYZ Company could provide the information its customers wanted. An alternative marketing strategy, Alternative #1, incorporating these customer-centric new programs was developed to seek to build more business out of the current customer segment.

6. A second alternative was considered as well. In Alternative #2 XYZ Company would incorporate the changes from Alternative #1, but go further and change how it approached Acquisition. Its sales force hadn't been as successful as could be desired so another approach could be warranted. In this strategy it would develop an IMAP (Integrated Market Action Program) that sought to lower the cost of Acquisition by lowering incremental costs using tactics of direct mail and telemarketing to sort through the target market to find those prospects more likely to be interested in XYZ Company's services instead of having their sales people do it. Marketing materials were also upgraded. Because of the significant changes, more training was also added to redirect the sales force to Closing activities.

7. In doing the Customer LifeCycle Profitability Models for Alternatives #1 and #2, a number of assumptions were considered in the best and worst case scenarios:
   - Holding the average yearly sale steady or increasing it,
   - Holding or increasing the number of new customers without referral,
   - Increasing the referral rate because of the program,
   - Holding the retention rate steady or increasing it because of the program,
   - Holding or lowering Back Office cost percentage because of automation,
   - Holding or increasing conversion rates in Acquisition and Closing, and
   - Lowering incremental costs in Acquisition while raising fixed costs there.

   In addition the SBR Factor, used to modify risk in the financial calculation, was expected to change for the better with the anticipated results of the new programs and investments, nearly doubling by year three and making substantial improvements in the Acquisition phase allocation.

8. Being conservative, management decided to look at the best case scenario of status quo and the worst case scenarios of the alternatives in making their choice of

marketing strategy to pursue. Alternative #2 was the clear winner even with worst case. If management was right in their assumptions, with Alternative #2 revenue would not decline as much and while the margin rate was expected to drop by 1%, the Cumulative NPV Profit could be over $4,000,000 and worth the risk. It would put $2,334,500 more at risk in year one try it, or an increase in the budget of about 3%. With Alternative #2, management could address its customers concerns while potentially making more money.

9. An Interaction ROI (I ROI) Model Report confirmed the choice. And management implemented the Alternative #2, including producing the Promotional/Relationship Enhancement (P/RE) Tactics, configuring the Relationship Tracking (RT) System, and training the Front Office people.

10. A follow up Tracking Study after the new Marketing Strategy was implemented rated XYZ Company against its chief competitor ABC Company and found XYZ Company was being considered more frequently than ABC Company by a ratio of 10:1. This information was recorded in the Relationship Tracking System along with results of the previous Targeting Research to aid the sales force in Closing presentations.

Analysis: When it is ready to establish leading indicator metrics, document benefits and hone its business model, XYZ Company will consider the following since these were the variable it thought might fluctuate:

- What happened to the average yearly sale,
- How many new customers without referral did it get,
- What happened to the referral rate,
- Did the retention rate change,
- Did the Back Office cost percentage change,
- What were the conversion rates in Acquisition and Closing, and
- What happened with incremental costs in Acquisition.

After looking at the results overall, to understand how its efforts in attracting more customers are working XYZ Company will segment by the customers it had when it started the new marketing strategy and the new customers gained after the new marketing strategy, further segmented into those in the same industries as the old customers and those in new industries. It will also look at the profitability of referred customers versus new customers without referral.

XYZ Company needs more customers so when it finds the most profitable set of customers, it will match the Attributes of those customers with others in the Target Market to attempt to acquire them as customers, focusing its efforts where its most likely source of profit is.

XYZ Company will study the Characteristics as well as the patterns of the most profitable customers to see if the Characteristics and patterns can be replicated with its other customers to maximize the profit flow from them.

XYZ Company is changing its Front Office process and its estimates of Incremental costs may be off. If the Incremental costs are different than expected, management will drill down into the Interaction ROI Model reports to understand what happened and how to improve.

Because XYZ Company had identified a vulnerability with its existing customers it will study the pattern followed by customers who become unhappy to see where the problem is to fix it.

In addition to paying attention to the Retention Rates, XYZ Company will also commission and then correlate Satisfaction Research with the patterns of the most profitable customers to see how its Influencer Program is working.

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